Travel Activities & Motivation Survey

Rapport sur les cycles de vie du marché

TAMS
Travel Activities &
Motivation Survey

Février 2002

Lang

Travel Activities & Motivation Survey

Copyright owned by:

Atlantic Tourism Partnership

Canadian Tourism Commission

Department of Canadian Heritage

Greater Toronto Hotel Association

Manitoba Ministry of Industry, Trade and Tourism

Northern Ontario Heritage Fund

Ontario Casino Corporation

Ontario Ministry of Agriculture, Food and Rural Affairs

Ontario Ministry of Tourism, Culture and Recreation

Ontario Tourism Marketing Partnership

Parks Canada

Saskatchewan Tourism Authority

Tourism B.C.

Tourism Toronto

Yukon Government Department of Tourism

Prepared by:

Lang Research Inc.

ISBN (print): 0-7794-2966-4

ISBN (Internet): 0-7794-2967-2

Table of Contents

Principales conclusions viii

Introduction

Contexte 12
Construction of Segmentation Scheme 13

Lifecycle Markets Overview

Incidence of Lifecycle Markets 15
Incidence: Canada versus United States 17
By Average Age and Household Income 18
By Education and Household Income 19
Average Number of Trips Taken Last Two Years 20
Incidence: By Number of Trips Taken in Last Two Years 21
Average Number of Canadian Trips Taken by Canadians 22
Average Number of Canadian Trips Taken by Americans 23
Percent Likely to Take Canadian Trip Next Two Years: Canada 24
Percent Likely to Take Canadian Trip Next Two Years: U.S. 25
Destination Image Mapping 26
Vacation Image of Canada 27
Vacation Image of Ontario 28

Table of Contents

Youth Market — Detailed Lifecycle Market Profile

Youth Market: Description	30
By Province	31
By U.S. Region	32
By Demographics: Canada	33
By Demographics: United States	34
Trips to Various Destinations in Last Two Years	35
Percent Taking Trip Each Season	36
Percent Taking Trip For Various Reasons	37
Canada vs. U.S.: By Trips in Canada Last Two Years	38
Canadians Taking Trips to Various Provinces	39
Americans Taking Trips to Various Provinces	40
Intentions to Travel Within/To Canada Next Two Years	41
General Vacation Experiences Sought	42
Outdoor Activities Sought While Travelling	43
Outdoor Activities Sought While Not Travelling	44
Culture and Entertainment Activities Sought While Travelling	45
Culture and Entertainment Activities Sought While Not Travelling	46
Accommodation-Related Activities Sought While Travelling	47
Day and Overnight Touring Activities	48
Percent Taking Various Types of Overnight Business Trips	49
Composition of Travel Party for Brief and Longer Trips	50
Types of Accommodations Used for Brief and Longer Trips	51
Information Sources Used to Plan Vacations	52
How Often Travel Packages Used for Brief and Longer Trips	53
Media Index for Print Media	54
Media Indexing for Television Programming	55
Percent Using Internet and Booking Trips	56
Vacation Image of Canada	57
Vacation Image of Ontario	58
Interest in New Tourism Products	59

Table of Contents

Family Market — Detailed Segment Profile

Family Market: Description	62
By Province	63
By U.S. Region	64
By Demographics: Canada	65
By Demographics: United States	66
Trips to Various Destinations in Last Two Years	67
Percent Taking Trip Each Season	68
Percent Taking Trip For Various Reasons	69
Canada vs. U.S.: By Trips in Canada Last Two Years	70
Canadians Taking Trips to Various Provinces	71
Americans Taking Trips to Various Provinces	72
Intentions to Travel Within/To Canada Next Two Years	73
General Vacation Experiences Sought	74
Outdoor Activities Sought While Travelling	75
Outdoor Activities Sought While Not Travelling	76
Culture and Entertainment Activities Sought While Travelling	77
Culture and Entertainment Activities Sought While Not Travelling	78
Accommodation-Related Activities Sought While Travelling	79
Day and Overnight Touring Activities	80
Percent Taking Various Types of Overnight Business Trips	81
Composition of Travel Party for Brief and Longer Trips	82
Types of Accommodations Used for Brief and Longer Trips	83
Information Sources Used to Plan Vacations	84
How Often Travel Packages Used for Brief and Longer Trips	85
Media Index for Print Media	86
Media Indexing for Television Programming	87
Percent Using Internet and Booking Trips	88
Vacation Image of Canada	89
Vacation Image of Ontario	90
Interest in New Tourism Products	91

Table of Contents

Mature Market — Detailed Segment Profile

Mature Market: Description	94
By Province	95
By U.S. Region	96
By Demographics: Canada	97
By Demographics: United States	98
Trips to Various Destinations in Last Two Years	99
Percent Taking Trip Each Season	100
Percent Taking Trip For Various Reasons	101
Canada vs. U.S.: By Trips in Canada Last Two Years	102
Canadians Taking Trips to Various Provinces	103
Americans Taking Trips to Various Provinces	104
Intentions to Travel Within/To Canada Next Two Years	105
General Vacation Experiences Sought	106
Outdoor Activities Sought While travelling	107
Outdoor Activities Sought While Not travelling	108
Culture and Entertainment Activities Sought While travelling	109
Culture and Entertainment Activities Sought While Not travelling	110
Accommodation-Related Activities Sought While travelling	111
Day and Overnight Touring Activities	112
Percent Taking Various Types of Overnight Business Trips	113
Composition of Travel Party for Brief and Longer Trips	114
Types of Accommodations Used for Brief and Longer Trips	115
Information Sources Used to Plan Vacations	116
How Often Travel Packages Used for Brief and Longer Trips	117
Media Index for Print Media	118
Media Indexing for Television Programming	119
Percent Using Internet and Booking Trips	120
Vacation Image of Canada	121
Vacation Image of Ontario	122
Interest in New Tourism Products	123

Table of Contents

Seniors Market — Detailed Segment Profile

Seniors Market: Description	126
By Province	127
By U.S. Region	128
By Demographics: Canada	129
By Demographics: United States	130
Trips to Various Destinations in Last Two Years	131
Percent Taking Trip Each Season	132
Percent Taking Trip For Various Reasons	133
Canada vs. U.S.: By Trips in Canada Last Two Years	134
Canadians Taking Trips to Various Provinces	135
Americans Taking Trips to Various Provinces	136
Intentions to Travel Within/To Canada Next Two Years	137
General Vacation Experiences Sought	138
Outdoor Activities Sought While travelling	139
Outdoor Activities Sought While Not travelling	140
Culture and Entertainment Activities Sought While travelling	141
Culture and Entertainment Activities Sought While Not travelling	142
Accommodation-Related Activities Sought While travelling	143
Day and Overnight Touring Activities	144
Percent Taking Various Types of Overnight Business Trips	145
Composition of Travel Party for Brief and Longer Trips	146
Types of Accommodations Used for Brief and Longer Trips	147
Information Sources Used to Plan Vacations	148
How Often Travel Packages Used for Brief and Longer Trips	149
Media Index for Print Media	150
Media Indexing for Television Programming	151
Percent Using Internet and Booking Trips	152
Vacation Image of Canada	153
Vacation Image of Ontario	154
Interest in New Tourism Products	155

Les cycles de vie du marché

— Principales conclusions —

On peut répartir le marché du tourisme canadien et américain en quatre segments de cycle de vie. Ces segments, que l'on appelle les « cycles de vie du marché », comprennent le marché des jeunes (18 à 35 ans; pas d'enfant âgé de moins de 20 ans habitant au foyer); le marché des familles (enfant âgés de moins de 20 ans habitant au foyer); le marché des personnes d'âge mûr (36 à 65 ans, pas d'enfant âgé de moins de 20 ans habitant au foyer) et le marché des personnes âgées (66 ans et plus; pas d'enfant âgé de moins de 20 ans habitant au foyer).

Le marché des jeunes

Le marché des jeunes représentait 20 pour cent du marché du tourisme. Comme dans l'ensemble le marché des jeunes se trouve au début de sa carrière professionnelle, il a tendance à signaler un faible revenu de ménage, bien qu'il détienne le niveau de scolarité le plus élevé des quatre marchés.

Les répondants de ce marché étaient beaucoup plus susceptibles d'avoir voyagé au Canada au cours des deux dernières années, en particulier dans leur propre province. De plus, le marché des jeunes canadiens et américains était plus susceptible que la moyenne d'exprimer l'intention de voyager au Canada au cours des deux prochaines années.

L'approche du marché des jeunes à l'égard du voyage se caractérisait par un niveau d'énergie élevé, tant en ce qui concernait les activités entreprises que les expériences de vacances recherchées au cours des deux dernières années. Par rapport au touriste moyen, le marché des jeunes était en particulier susceptible d'avoir recherché des expériences de vacances axées sur le plaisir personnel (p.ex., magasinage, restaurants fins, vie nocturne).

Les jeunes de ce segment s'adonnaient aussi davantage que le touriste moyen à une vaste gamme d'activités de plein air, d'activités culturelles et de divertissements. En ce qui concerne les activités de plein air, ils pratiquaient beaucoup plus que le touriste moyen des sports d'hiver extrêmes, le conditionnement physique, le canotage, le kayak, la randonnée pédestre, les sports d'équipe et le cyclisme. Au cours des deux dernières années, ils étaient aussi beaucoup plus susceptibles que le touriste moyen d'avoir assisté à des concerts, des carnavals et des festivals et d'avoir campé sur des terrains de camping publics ou en pleine nature.

Des quatre cycles de vie du marché, le marché des jeunes était le plus susceptible d'utiliser Internet comme outil de recherche et d'y avoir fait des réservations de voyage.

Les cycles de vie du marché

— Principales conclusions —

Le marché des familles

Le marché des familles représentait un tiers (33 %) de tout le marché du tourisme. Comme ce marché comptait un nombre au-dessus de la moyenne de ménages ayant un niveau de scolarité élevé et un haut niveau de revenu, il était par conséquent le plus aisé des quatre cycles de vie du marché .

Par rapport à tout le marché des touristes, le marché des familles était légèrement moins susceptible d'avoir effectué un voyage aux États-Unis ou dans d'autres pays, ce qui montre que beaucoup de familles de ce segment ont tendance à voyager accompagnées de leurs enfants et que, de ce fait, elles effectuaient des voyages à des distances plus courtes. Le marché des familles canadiennes représentait un important marché touristique intérieur et était plus susceptible que d'autres marchés canadiens d'envisager de faire un voyage au Canada au cours des deux prochaines années. Les familles américaines étaient légèrement moins susceptibles que le touriste américain type de planifier un voyage au Canada au cours des deux prochaines années.

Les voyages d'agrément du marché des familles reflétaient un désir de passer des vacances visant la récupération (p.ex., bains de soleil, natation, pêche). La participation au-dessus de la moyenne à des sports d'équipe et à des visites d'attractions adaptées aux enfants (p.ex., zoos, aquariums, planétariums, parcs thématiques et parcs d'attractions) témoignait des priorités des enfants. Les familles de ce segment étaient plus susceptibles que le voyageur moyen d'avoir fait des excursions d'une journée ou de plus d'une journée au cours des deux dernières années.

Le marché des personnes d'âge mûr

Le marché des personnes d'âge mûr représentait un tiers (32 %) de tout le marché du tourisme et avait tendance à avoir un niveau d'éducation et une aisance assez élevées. Le comportement passé et les intentions de voyage à l'avenir de ces personnes au Canada se rapprochaient de la moyenne.

Le marché des personnes d'âge mûr était légèrement plus susceptible que la moyenne d'avoir recherché des activités d'exploration pendant des vacances. Il était plus susceptible que la moyenne d'avoir fait des excursions dans la nature et d'avoir visité des jardins ou des attractions naturelles, des foires agricoles ou locales, des musées et des galeries d'art, ou des sites historiques, d'avoir joué au casino ou à des courses de chevaux, d'avoir magasiné, dîné dans des restaurants ou assisté à des attractions culturelles autochtones ou d'en avoir visité pendant un voyage au cours des deux dernières années. Le marché des personnes d'âge mûr était aussi plus susceptible que les autres d'avoir passé du temps dans une station balnéaire, fait des excursions à bord d'un véhicule privé ou une tournée des caves vinicoles au cours des deux dernières années. Ces personnes utilisaient plus que la moyenne des forfaits de voyages.

Les cycles de vie du marché

— Principales conclusions —

Le marché des personnes d'âge mûr était plus susceptible d'avoir voyagé sans enfant, en compagnie d'un époux ou d'une amie ou d'un ami intime au cours des deux dernières années. Les personnes d'âge mûr de ce segment étaient quelque peu moins susceptibles d'avoir voyagé en compagnie d'enfants, de membres de la famille ou d'amis, mais légèrement plus susceptibles que la moyenne d'avoir voyagé seules.

Le marché des personnes âgées

Le marché des personnes âgées, le plus petit des quatre cycles de vie du marché, représentait 15 pour cent seulement du marché du tourisme. Le niveau d'éducation et le revenu des ménages avaient tendance à y être plus faibles.

En dépit de sa taille relativement petite, le marché américain des personnes âgées mérite qu'on lui porte une attention particulière dans le contexte du marché du tourisme canadien, puisqu'on y notait une surreprésentation parmi les Américains qui ont visité le Canada au cours des deux dernières années. Ce marché était aussi plus susceptibles que la moyenne de visiter d'autres régions des États-Unis et des pays étrangers.

Le marché des personnes âgées était en particulier susceptible d'avoir recherché des expériences de vacances axées sur l'exploration. Les personnes âgées étaient beaucoup plus susceptibles de voir dans des vacances l'occasion de se détendre, ce qui suggère qu'elles recherchaient stimulation et enrichissement pendant ces périodes plutôt que repos et récupération. Si elles avaient tendance à moins participer que le voyageur moyen à des activités de plein air, l'intérêt que suscitait en elles les activités de type exploratoire se manifestait dans leur participation au-dessus de la moyenne à des excursions d'observation de la nature, à la visite de jardins et d'attractions naturelles, de musées, de galeries d'art, de sites historiques et à la fréquentation de festivals culturels. Le marché des personnes âgées trouvait néanmoins le temps de se distraire et était plus susceptible d'avoir joué au casino ou à des courses de chevaux, d'avoir assisté à des manifestations sportives internationales ou d'avoir protégé les beaux-arts (p.ex., ballet, opéra) pendant un voyage. Les personnes âgées étaient plus susceptibles que le touriste moyen d'avoir fait des visites guidées de régions rurales ou de villes.

Le marché des personnes âgées se servait plus que les autres des sources traditionnelles de renseignements touristiques, en particulier des brochures reçues au courrier, des systèmes de réservations des lignes aériennes et des clubs automobiles. Les. personnes âgées regardaient plus la télévision que la moyenne et étaient en particulier surreprésentés parmi les téléspectateurs regardant les émissions quotidiennes dans la journée. Elles regardaient aussi davantage les nouvelles et lisaient plus de magazines d'actualités que la moyenne

Section One

Introduction

Contexte

Des ministères et des organismes de tourisme du Canada se sont associés pour effectuer deux importantes études d'évaluation des activités et des éléments de motivation en matière de voyages d'agrément chez les Canadiens et les Américains.

Cette enquête, intitulée *Enquête sur les activités et les préférences en matière de voyage* (EAPMV), représente une évaluation approfondie des comportements et des éléments de motivation en matière de voyages et fournit une base de données riche et sérieuse pour élaborer des stratégies de commercialisation et créer des produits de voyage visant à attirer des touristes au Canada et en Ontario.

La série d'analyses actuellement en cours s'appuie sur la base de données de l'EAPMV pour examiner les tendances du marché et les facteurs qui motivent le comportement en matière de voyages. L'EAPMV, qui comprenait une enquête par téléphone et une enquête par courrier-réponse à laquelle les répondants devaient répondre, a été menée au Canada et aux États-Unis du 27 septembre 1999 au 16 avril 2000. L'enquête par téléphone a été menée auprès de 28 397 personnes aux États-Unis et de 18 385 personnes au Canada. Les répondants ont été choisis au hasard dans des ménages. On a demandé aux participants à l'enquête par téléphone qui avaient voyagé au cours des deux années précédentes ou qui souhaitaient faire un voyage au cours des deux prochaines années de remplir un questionnaire par courrier-réponse. En tout, 40 271 personnes se sont qualifiées pour le questionnaire par courrier-réponse. Sur ce nombre, 11 892 personnes (29,4 %) ont renvoyé le questionnaire dûment rempli. Le taux de réponse au questionnaire a été plus élevé au Canada, soit 5 490 personnes (35,2 %), qu'aux États-Unis, soit 6 405 personnes (26,0 %).

L'étude actuelle porte sur le marché du tourisme selon quatre étapes du cycle de vie : le marché des jeunes (18 à 35 ans; pas d'enfant âgé de moins de 20 ans habitant au foyer); le marché des familles (enfant âgés de moins de 20 ans habitant au foyer); le marché des personnes d'âge mûr (36 à 65 ans, pas d'enfant âgé de moins de 20 ans habitant au foyer) et le marché des personnes âgées (66 ans et plus; pas d'enfant âgé de moins de 20 ans habitant au foyer). On appelle collectivement ces quatre groupes les « cycles de vie du marché ». Ce rapport fournit un profil démographique, les activités des Canadiens en matière de voyages, les intentions de voyage des Canadiens, les expériences de vacances recherchées au cours des deux années précédentes, les activités de vacances auxquelles les répondants ont participé au cours des deux années, les habitudes de consommation de médias, les sources d'information consultées pour planifier de brèves ou de longues vacances ainsi que les impressions à propos du Canada et de l'Ontario.

Travel Activities & Motivation Survey

Lifecycle Markets Report

TAMS
Travel Activities &
Motivation Survey

February, 2002

Lang

Travel Activities & Motivation Survey

Copyright owned by:

Atlantic Tourism Partnership

Canadian Tourism Commission

Department of Canadian Heritage

Greater Toronto Hotel Association

Manitoba Ministry of Industry, Trade and Tourism

Northern Ontario Heritage Fund

Ontario Casino Corporation

Ontario Ministry of Agriculture, Food and Rural Affairs

Ontario Ministry of Tourism, Culture and Recreation

Ontario Tourism Marketing Partnership

Parks Canada

Saskatchewan Tourism Authority

Tourism B.C.

Tourism Toronto

Yukon Government Department of Tourism

104-00469/

Prepared by:

Lang Research Inc.

ISBN (print): 0-7794-2966-4

ISBN (Internet): 0-7794-2967-2

Table of Contents

Executive Summary viii

Introduction
- Background 12
- Construction of Segmentation Scheme 13

Lifecycle Markets Overview
- Incidence of Lifecycle Markets 15
- Incidence: Canada versus United States 17
- By Average Age and Household Income 18
- By Education and Household Income 19
- Average Number of Trips Taken Last Two Years 20
- Incidence: By Number of Trips Taken in Last Two Years 21
- Average Number of Canadian Trips Taken by Canadians 22
- Average Number of Canadian Trips Taken by Americans 23
- Percent Likely to Take Canadian Trip Next Two Years: Canada 24
- Percent Likely to Take Canadian Trip Next Two Years: U.S. 25
- Destination Image Mapping 26
- Vacation Image of Canada 27
- Vacation Image of Ontario 28

Table of Contents

Youth Market — Detailed Lifecycle Market Profile

Youth Market: Description	30
By Province	31
By U.S. Region	32
By Demographics: Canada	33
By Demographics: United States	34
Trips to Various Destinations in Last Two Years	35
Percent Taking Trip Each Season	36
Percent Taking Trip For Various Reasons	37
Canada vs. U.S.: By Trips in Canada Last Two Years	38
Canadians Taking Trips to Various Provinces	39
Americans Taking Trips to Various Provinces	40
Intentions to Travel Within/To Canada Next Two Years	41
General Vacation Experiences Sought	42
Outdoor Activities Sought While Travelling	43
Outdoor Activities Sought While Not Travelling	44
Culture and Entertainment Activities Sought While Travelling	45
Culture and Entertainment Activities Sought While Not Travelling	46
Accommodation-Related Activities Sought While Travelling	47
Day and Overnight Touring Activities	48
Percent Taking Various Types of Overnight Business Trips	49
Composition of Travel Party for Brief and Longer Trips	50
Types of Accommodations Used for Brief and Longer Trips	51
Information Sources Used to Plan Vacations	52
How Often Travel Packages Used for Brief and Longer Trips	53
Media Index for Print Media	54
Media Indexing for Television Programming	55
Percent Using Internet and Booking Trips	56
Vacation Image of Canada	57
Vacation Image of Ontario	58
Interest in New Tourism Products	59

Table of Contents

Family Market — Detailed Segment Profile

Family Market: Description	62
By Province	63
By U.S. Region	64
By Demographics: Canada	65
By Demographics: United States	66
Trips to Various Destinations in Last Two Years	67
Percent Taking Trip Each Season	68
Percent Taking Trip For Various Reasons	69
Canada vs. U.S.: By Trips in Canada Last Two Years	70
Canadians Taking Trips to Various Provinces	71
Americans Taking Trips to Various Provinces	72
Intentions to Travel Within/To Canada Next Two Years	73
General Vacation Experiences Sought	74
Outdoor Activities Sought While Travelling	75
Outdoor Activities Sought While Not Travelling	76
Culture and Entertainment Activities Sought While Travelling	77
Culture and Entertainment Activities Sought While Not Travelling	78
Accommodation-Related Activities Sought While Travelling	79
Day and Overnight Touring Activities	80
Percent Taking Various Types of Overnight Business Trips	81
Composition of Travel Party for Brief and Longer Trips	82
Types of Accommodations Used for Brief and Longer Trips	83
Information Sources Used to Plan Vacations	84
How Often Travel Packages Used for Brief and Longer Trips	85
Media Index for Print Media	86
Media Indexing for Television Programming	87
Percent Using Internet and Booking Trips	88
Vacation Image of Canada	89
Vacation Image of Ontario	90
Interest in New Tourism Products	91

Table of Contents

Mature Market — Detailed Segment Profile

Mature Market: Description	94
By Province	95
By U.S. Region	96
By Demographics: Canada	97
By Demographics: United States	98
Trips to Various Destinations in Last Two Years	99
Percent Taking Trip Each Season	100
Percent Taking Trip For Various Reasons	101
Canada vs. U.S.: By Trips in Canada Last Two Years	102
Canadians Taking Trips to Various Provinces	103
Americans Taking Trips to Various Provinces	104
Intentions to Travel Within/To Canada Next Two Years	105
General Vacation Experiences Sought	106
Outdoor Activities Sought While travelling	107
Outdoor Activities Sought While Not travelling	108
Culture and Entertainment Activities Sought While travelling	109
Culture and Entertainment Activities Sought While Not travelling	110
Accommodation-Related Activities Sought While travelling	111
Day and Overnight Touring Activities	112
Percent Taking Various Types of Overnight Business Trips	113
Composition of Travel Party for Brief and Longer Trips	114
Types of Accommodations Used for Brief and Longer Trips	115
Information Sources Used to Plan Vacations	116
How Often Travel Packages Used for Brief and Longer Trips	117
Media Index for Print Media	118
Media Indexing for Television Programming	119
Percent Using Internet and Booking Trips	120
Vacation Image of Canada	121
Vacation Image of Ontario	122
Interest in New Tourism Products	123

Table of Contents

Seniors Market — Detailed Segment Profile

Seniors Market: Description 126
By Province 127
By U.S. Region 128
By Demographics: Canada 129
By Demographics: United States 130
Trips to Various Destinations in Last Two Years 131
Percent Taking Trip Each Season 132
Percent Taking Trip For Various Reasons 133
Canada vs. U.S.: By Trips in Canada Last Two Years 134
Canadians Taking Trips to Various Provinces 135
Americans Taking Trips to Various Provinces 136
Intentions to Travel Within/To Canada Next Two Years 137
General Vacation Experiences Sought 138
Outdoor Activities Sought While travelling 139
Outdoor Activities Sought While Not travelling 140
Culture and Entertainment Activities Sought While travelling 141
Culture and Entertainment Activities Sought While Not travelling 142
Accommodation-Related Activities Sought While travelling 143
Day and Overnight Touring Activities 144
Percent Taking Various Types of Overnight Business Trips 145
Composition of Travel Party for Brief and Longer Trips 146
Types of Accommodations Used for Brief and Longer Trips 147
Information Sources Used to Plan Vacations 148
How Often Travel Packages Used for Brief and Longer Trips 149
Media Index for Print Media 150
Media Indexing for Television Programming 151
Percent Using Internet and Booking Trips 152
Vacation Image of Canada 153
Vacation Image of Ontario 154
Interest in New Tourism Products 155

Lifecycle Markets

— Key Findings —

The Canadian and American travel markets can be divided into four segments with respect to lifecycle stage. These segments, referred to as "Lifecycle Markets," consist of the Youth Market (18 to 35; no children under 20 living at home); the Family Market (children under 20 living at home); the Mature Market (36 to 65, no children under 20 living at home) and the Seniors Market (66 and older; no children under 20 living at home).

Youth Market

The Youth Market accounted for 20 percent of the total travel market. Because the Youth Market tended to be in the early stages of career development, they tended to report lower household incomes despite being the best-educated of the four markets.

The Youth Market was much more likely to have travelled within Canada during the past two years, and especially within a respondent's own province. As well, both the Canadian and American Youth Markets were more likely than average to express intentions of travelling in Canada over the next two years.

The Youth Market exhibited a high-energy approach to travel, both in terms of the activities participated in and in the vacation experiences sought over the last two years. Relative to the average traveller, the Youth Market was especially likely to have sought out personal indulgence vacation experiences (e.g., shopping, fine dining, nightlife).

The Youth Market was also more active than the average traveller in a broad range of outdoor, cultural and entertainment vacation pursuits. In terms of outdoor activities, the Youth Market exhibited above-average participation in extreme winter sports, fitness activities, canoeing, kayaking or hiking, team sports and biking. They were also more likely than the average traveller to have attended concerts, carnivals and festivals while travelling during the past two years and to have camped in public campgrounds or in wilderness areas.

The Youth Market was the most likely of the four lifecycle markets to use the Internet as a research tool and to have booked travel arrangements using the Internet.

Lifecycle Markets

— Key Findings —

Family Market

The Family Market represented one-third (33 percent) of the total travel market. This market had an above-average incidence of well-educated, higher income households and was the most affluent of the four Lifecycle Markets.

Compared to all vacation travellers, the Family Market was slightly less likely to have taken a trip to the United States or to other countries. This reflects the fact that many within this segment tended to travel with their children and that travel with children tends to be to shorter-haul destinations. The Canadian Family Market represents an important domestic travel market as it was more likely than other Canadian markets to have plans to take a trip in Canada during the next two years. The American Family Market was slightly less likely than the typical American traveller to have had plans to visit Canada during the next two years.

The Family Market vacation travel reflected a desire for recuperative vacation experiences (i.e., sunbathing, swimming and fishing). The priorities of children were reflected in the Family Market's above-average participation in team sports and visits to child-oriented attractions (e.g., zoos, aquariums, planetariums, theme and amusement parks). They were less likely than the average traveller to have taken day and overnight tours during the past two years.

Mature Market

The Mature Market represented one-third (32 percent) of the total travel market and tended to be relatively well-educated and affluent. The previous behaviour and future intentions for travel in Canada for these people parallel the average.

The Mature Market was slightly more likely than average to have sought out exploratory vacation activities. These people were more likely than average to have gone natural sight-seeing, visited gardens or natural attractions, gambled at a casino or the horse races, visited agricultural or local fairs, visited museums, art galleries or historical sites, shopped, dined or visited aboriginal cultural attractions or events while travelling during the past two years. The Mature Market was also more likely than others to stay at seaside resorts, to have toured using their personal vehicle or to have taken a winery tour during the past two years .These people were above-average users of travel packages.

The Mature Market was more likely to have travelled with a spouse or partner without children during the past two years. They were somewhat less likely to have travelled with children, other family members or friends, but slightly more likely than average to have travelled alone.

Lifecycle Markets

— Key Findings —

Seniors Market

The Seniors Market was the smallest of the four Lifecycle Markets, representing only 15 percent of the travel market. This market tended to have lower levels of education and household income.

Despite its relatively small size, the American Seniors Market deserves special attention from the Canadian travel industry since it was overrepresented among Americans visiting Canada during the past two years. This market was also more likely than average to travel to other parts of the United States and to overseas countries.

The Seniors Market was most likely to have sought out exploratory vacation experiences. Seniors were much less likely to view vacations as opportunities for relaxation, suggesting that vacations are periods to seek out stimulation and enrichment, rather than a time for rest and recuperation. While generally less active in outdoor activities than the average traveller, their interest in exploratory vacation activities was reflected in their above-average participation in natural sightseeing, as well as visits to gardens and natural attractions, museums, art galleries, historical sites and cultural festivals. However, the Seniors Market also found time for some entertainment and was more likely to have gambled at casinos or horse races, to have attended international sporting events or to have patronised the high arts (e.g., ballet, opera) while travelling. The Seniors Market was also more likely than the average traveller to have taken guided tours of country or city areas.

The Seniors Market made more use than others of the traditional travel information sources, especially printed information received in the mail, airline reservation systems or auto clubs. Seniors were above-average television viewers and were especially over-represented in the weekday daytime programming audience. They were also above-average viewers of news programming and above-average readers of newsmagazines.

Section One

Introduction

Background

An association of Canadian tourism ministries and organizations collaborated to conduct two large-scale surveys to assess the travel activities and motivators of pleasure travel among Canadians and Americans.

This survey, known as the *Travel Activities & Motivation Survey* (TAMS), represents the comprehensive assessment of travel behavior and motivators. It provides a rich and authoritative database by which to develop marketing strategies and travel products to attract visitors to Canada and Ontario.

A series of analyses were conducted using the TAMS database to explore the travel patterns of the marketplace as well as the factors which motivate travel behavior. TAMS consisted of both a telephone survey and a self-completed mailback survey. The survey was conducted in Canada and the United States between September 27, 1999 and April 16, 2000. The telephone survey was completed by 28,397 individuals in the United States and by 18,385 individuals in Canada. Respondents were selected randomly within the household. People participating in the telephone survey who had travelled in the past two years or expressed interest in travel in the next two years were asked to complete a mailback questionnaire. Overall, 40,271 qualified for the mailback questionnaire. Of these, 11,892 (29.4 percent) returned usable questionnaires. The response rate was higher in Canada with 5,490 (35.2 percent) returning the questionnaire while 6,405 (26.0 percent) of the American respondents returned the questionnaire.

This current study examines the travel market from the perspective of four lifecycle stages: the Youth Market (18 to 35; no children under 20 living at home); the Family Market (children under 20 living at home); the Mature Market (36 to 65, no children under 20 living at home) and the Seniors Market (66 and older; no children under 20 living at home). These four groups are collectively referred to as the "Lifecycle Markets." This report profiles each of these segments by demographic attributes, Canadian travel activities, Canadian travel intentions, vacation experiences sought during the past two years, vacation activities participated in during the past two years, media consumption habits, information sources consulted to plan brief and longer vacations, and impressions of Canada and Ontario.

The Lifecycle Markets analysis is intended to provide greater insight into different interests that exist within the market for various types of vacation activities. This information can be used to develop strategic initiatives to attract selected sectors of the market to Canada and Ontario.

Lifecycle Markets

Construction of Segmentation Scheme

The Lifecycle Markets represent a collapsed version of a larger breakdown consisting of twelve segments. The larger segmentation scheme was developed using the OTMP Tracking database which consisted of 7,241 telephone interviews in Ontario and selected American Border States from July 1999 to October 2,000.

The original segmentation scheme was derived using demographic aggregates based on the age, household income and education level of the respondent. Near centriod cluster analysis was employed using a wide array of core segmentors. This included the incidence of 19 types of vacation travel, vacation planning patterns, the tendency to research vacation travel, interest in opportunities to learn, interest in novel and exotic destinations, interest in family-suitable vacations, interest in vacation packages, the appeal of outdoor vacations, the appeal of cultural exploration, the appeal in pampering and entertainment vacation experiences, the appeal of excitement and nightlife while on vacation and the appeal of relaxing in quiet setting while on vacation.

There are four lifecycle markets: the Youth Market, the Family Market, the Mature Market and the Seniors Market. These markets have the following demographic characteristics:

Youth Market:	18 to 35 years old, no children in the household under the age of 20
Family Market:	Children under the age of 20 living in the home; No age criterion for the respondent
Mature Market:	36 to 65 years old, no children in the household under the age of 20
Seniors Market:	66 and older, no children in the household under the age of 20

The relationship between the OTMP Segmentation system and the current lifecycle markets are as follows:

Youth Market:	Affluent Young Singles; Affluent Young Couples; Mainstream Youth Market
Family Market:	Affluent Families; Mainstream Young Families; Mainstream Mature Families
Mature Market:	Affluent Mature Singles, Mainstream Mature Singles, Mainstream Mature Couples and Affluent Mature Couples who were between 36 and 65 years of age
Seniors Market:	Affluent Mature Couples who were over 66, Mainstream Senior Couples and Senior Singles

Section Two

Lifecycle Markets

— Overview —

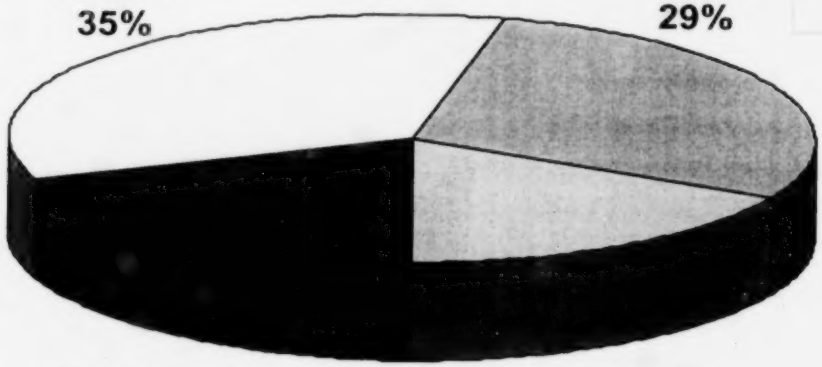
Incidence of Lifecycle Markets

Base: Total Adult Population (18-Plus) in Canada and U.S.

The American and Canadian adult (18-plus) population market were divided into four markets based on the Lifecycle Market of the respondent. The Family Market (35 percent) and the Mature Market (29 percent) were the largest sectors of the adult population. The Youth Market represented 19 percent of the total while the Seniors Market accounted for about 17 percent of the total adult market.

Family Market Population: 65,251,000
Unweighted Sample Size = 13,664

Mature Market Population: 55,042,000
Unweighted Sample Size = 12,174



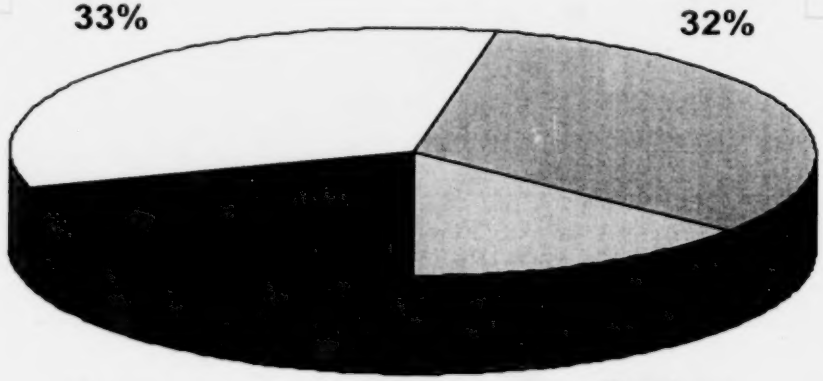
Youth Market Population: 36,677,000
Unweighted Sample Size = 8,523

Seniors Market Population: 33,029,000
Unweighted Sample Size = 6,142

Incidence of Lifecycle Markets

Base: Adult Population (18-Plus) in Canada and United States
Who Took a Trip/Plans to Take a Trip in the Last/Next Two Years

In terms of the travel market (i.e., those who took at least one trip during the past two years), the Family Market (33 percent) and the Mature Market (32 percent) each accounted for about one-third. The Youth market represented one-fifth (20 percent) of the travel market, while the Seniors Market was the smallest, accounting for one-seventh (15 percent) of the total travel market.



Family Market Population: 54,203,000
Unweighted Sample Size = 3,929

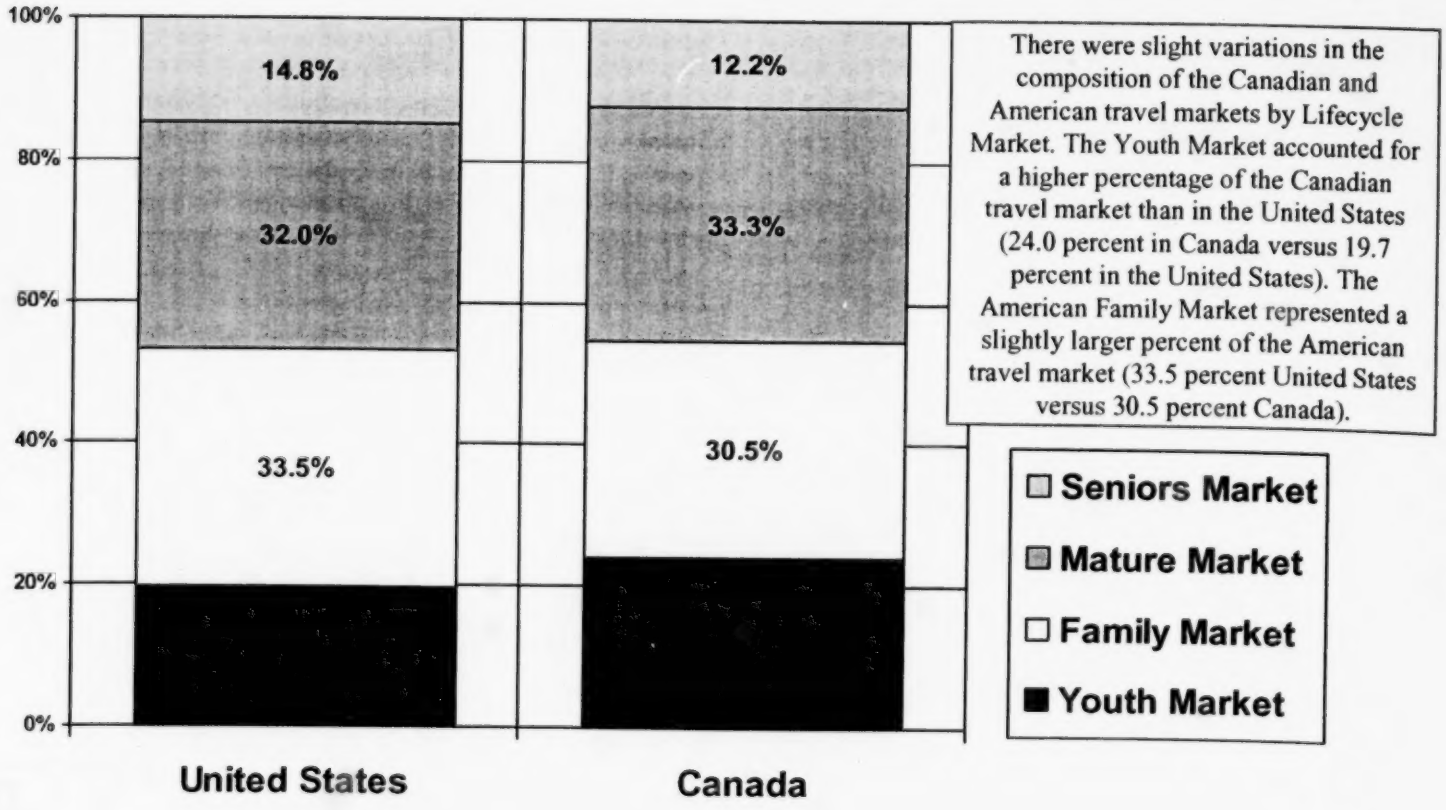
Mature Market Population: 52,505,000
Unweighted Sample Size = 3,799

Youth Market Population: 32,881,000
Unweighted Sample Size = 2,379

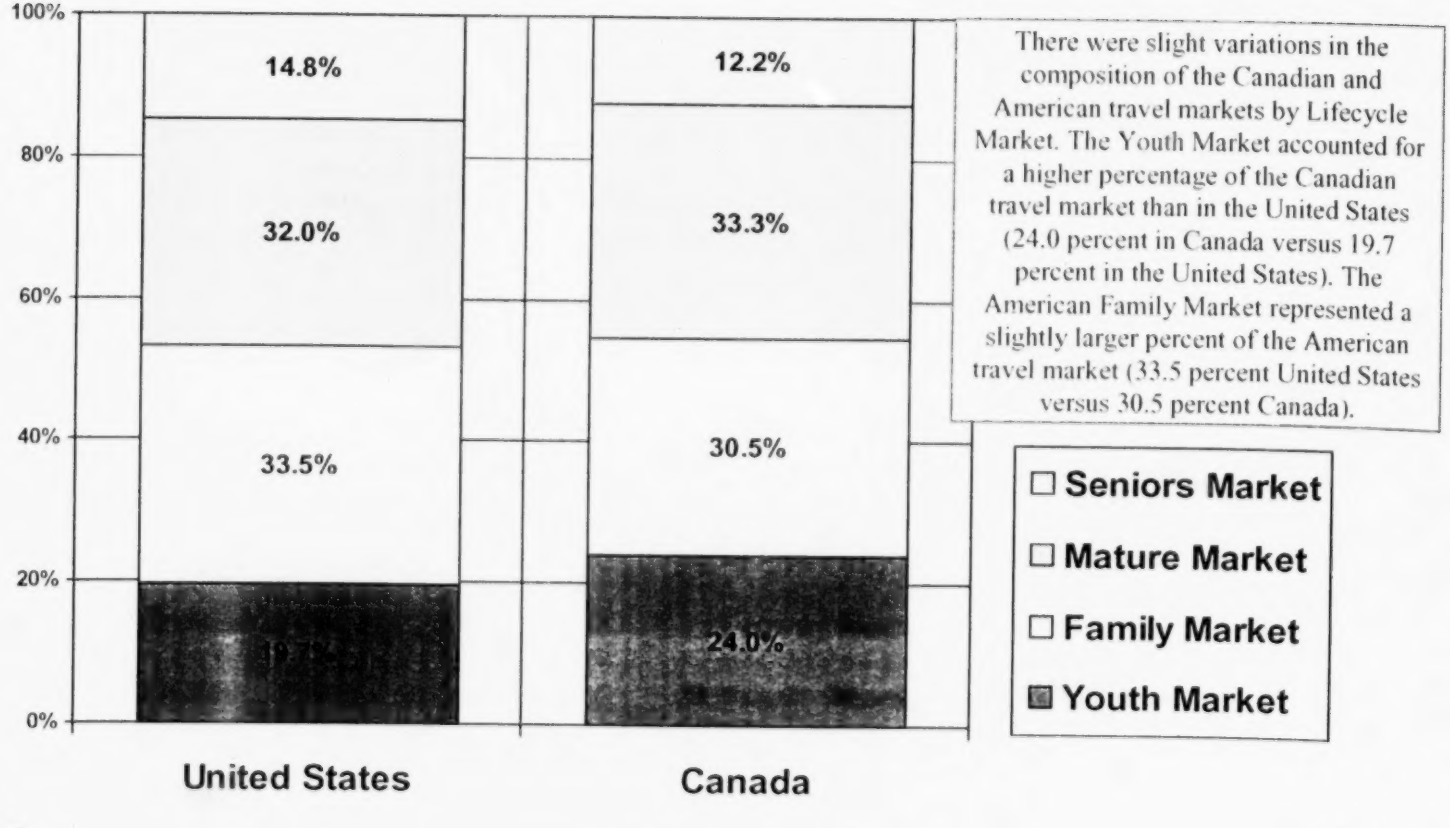
Seniors Market Population: 23,732,000
Unweighted Sample Size = 1,716

Lifecycle Markets
Incidence in Canada vs. U.S.

Base: Percent of Population (18-Plus) Who Took a Trip/Plans to Take a Trip in the Last/Next Two Years



There were slight variations in the composition of the Canadian and American travel markets by Lifecycle Market. The Youth Market accounted for a higher percentage of the Canadian travel market than in the United States (24.0 percent in Canada versus 19.7 percent in the United States). The American Family Market represented a slightly larger percent of the American travel market (33.5 percent United States versus 30.5 percent Canada).

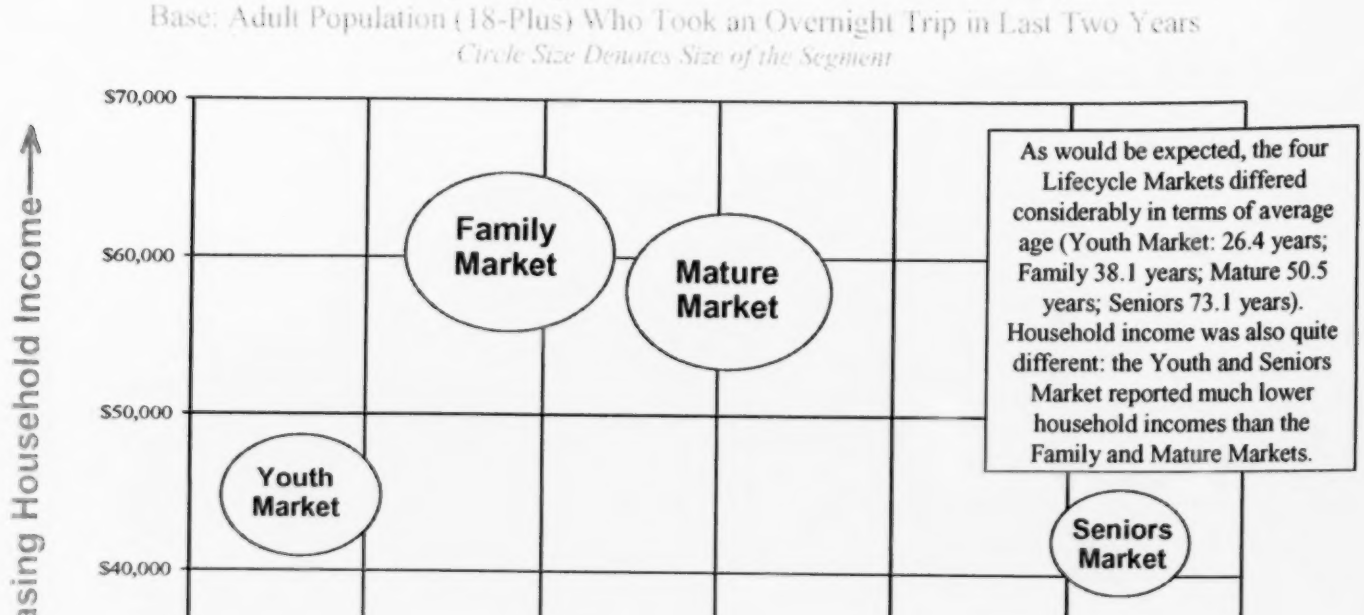


There were slight variations in the composition of the Canadian and American travel markets by Lifecycle Market. The Youth Market accounted for a higher percentage of the Canadian travel market than in the United States (24.0 percent in Canada versus 19.7 percent in the United States). The American Family Market represented a slightly larger percent of the American travel market (33.5 percent United States versus 30.5 percent Canada).

Lifecycle Markets
By Average Age and Household Income

Base: Adult Population (18-Plus) Who Took an Overnight Trip in Last Two Years

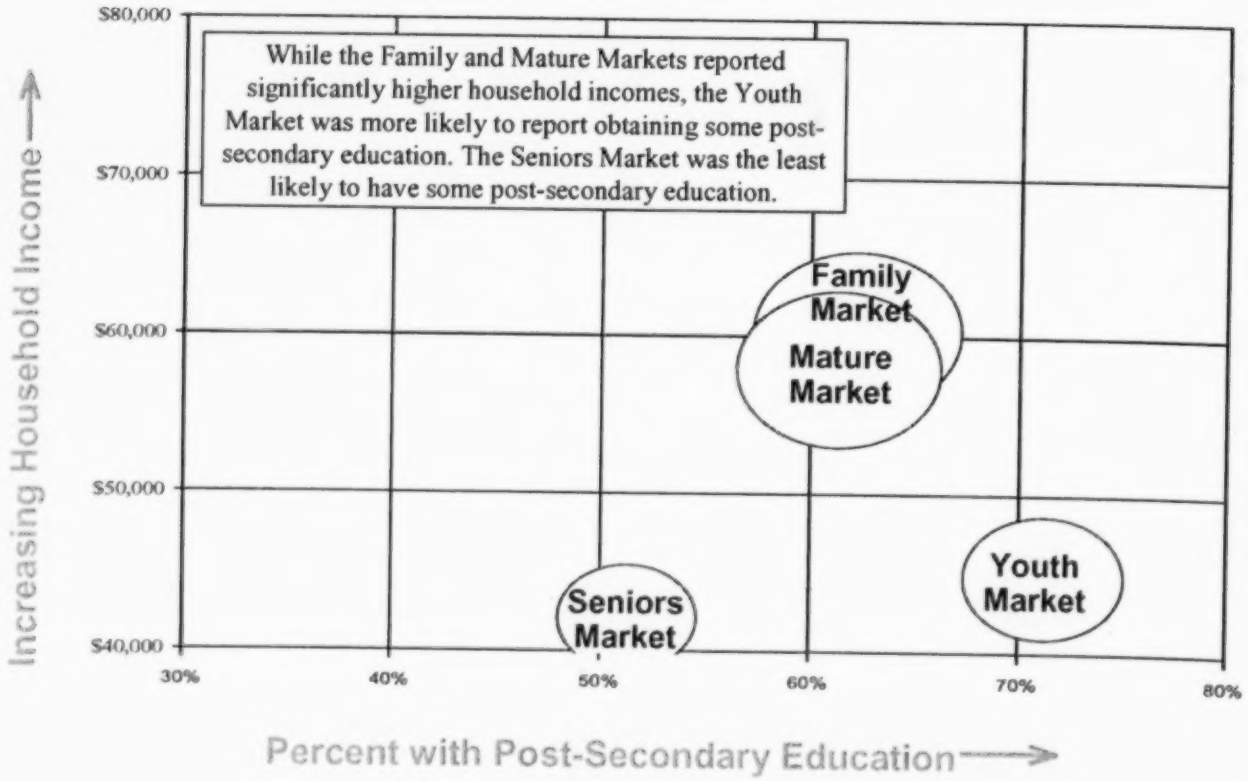
Circle Size Denotes Size of the Segment



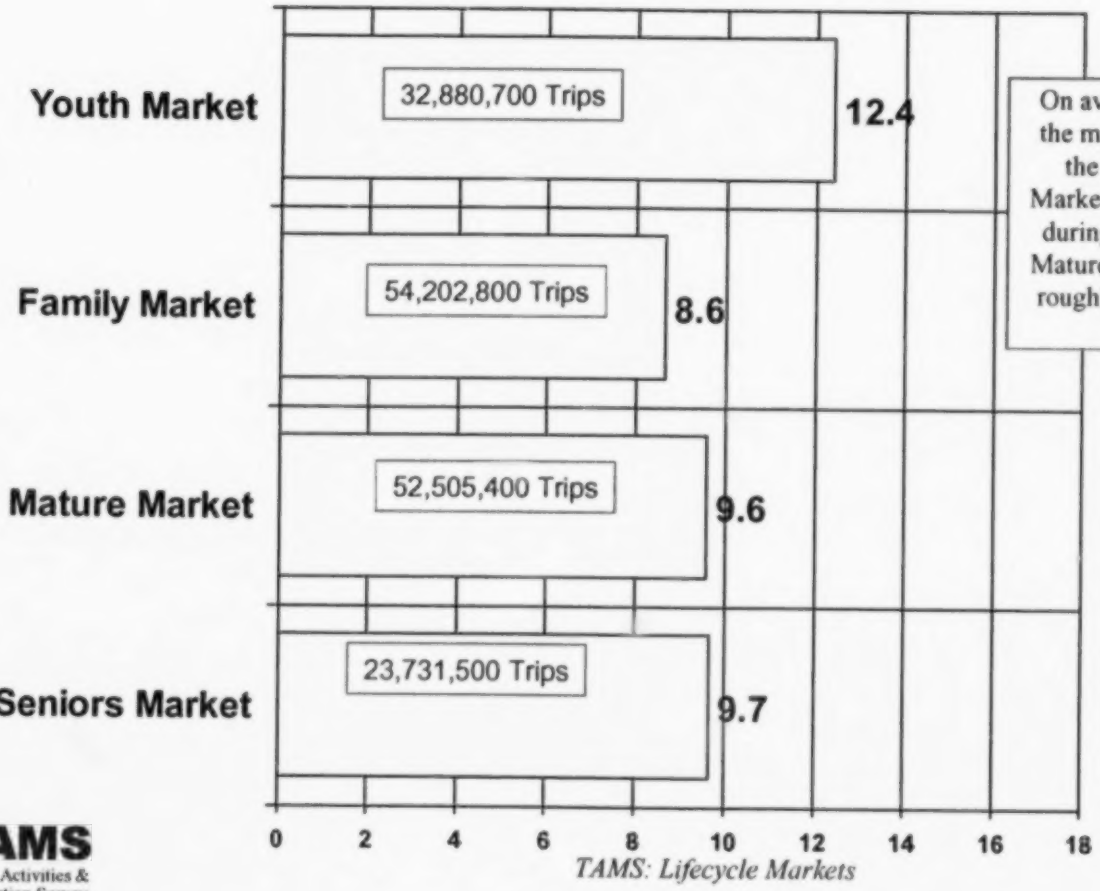
Lifecycle Markets
By Education and Household Income

Base: Adult Population (18-Plus) Who Took an Overnight Trip in Last Two Years

Circle Size Denotes Size of the Segment



Lifecycle Markets
Average Number of Trips Taken Last Two Years
Base: Adult Canadian/American Population (18-Plus) Who Took an Overnight Trip in Last Two Years



TAMS: Lifecycle Markets

On average, the Youth Market took the most overnight vacation trips in the past two years. The Family Market took the least number of trips during the past two years while the Mature and Seniors Market averaged roughly the same number of trips in the past two years.

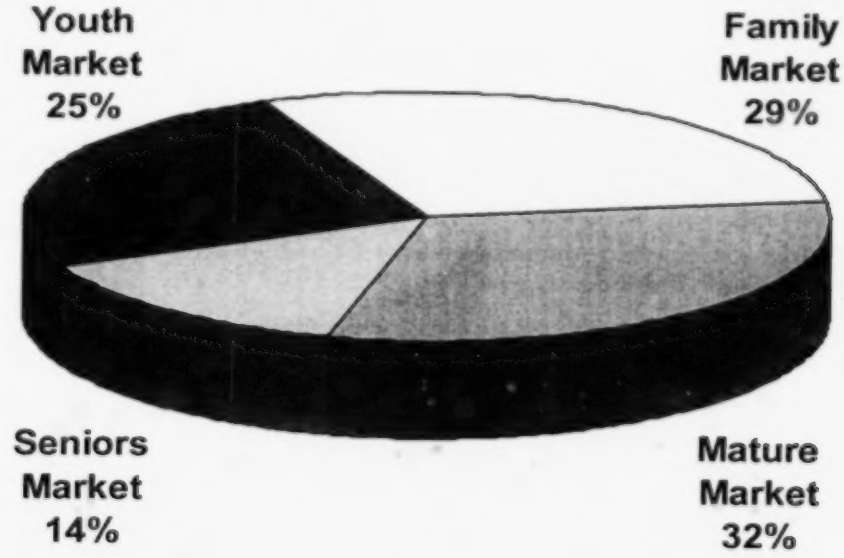
Technical Note

The estimated number of trips was determined by summing up the number of times selected destinations were visited in the last two years. Therefore, if the respondent visited multiple destinations on the same trip, it was counted as more than one trip, hence overestimating trips. On the other hand, the survey was restricted to people 18 and older, and therefore excluded trips taken by those 17 and under. This tended to under-estimate the number of trips taken.

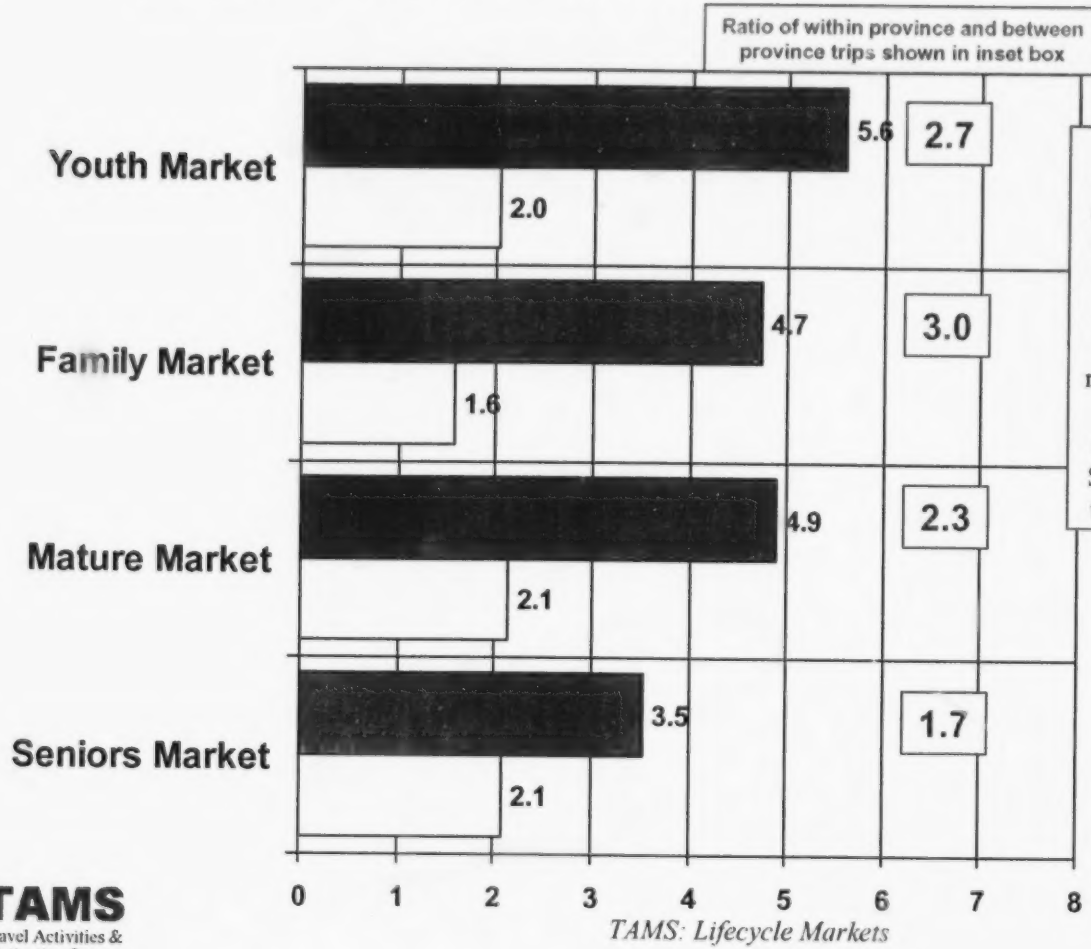
Incidence of Lifecycle Markets
By Number of Trips Taken in Last Two Years

Base: Adult Population (18-Plus) in Canada and United States Who Took an Overnight Trip in Last Two Years

When the incidence of each segment is expressed as a percent of the total trips taken within the past two years, the percent of trips attributable to the Youth Market increases to 25 percent relative to their incidence in the travel market (20 percent) while the percent of trips attributable to the Family Market declines to 29 percent relative to their incidence in the travel market (33 percent). Overall, the Mature Market accounted for the largest share of trips (32 percent) taken in the last two years.



Lifecycle Markets
Average Number Canadian Trips Taken By Canadians in Last Two Years
Base: Percent of Adult Canadian Population (18-Plus) Who Took an Overnight Trip in Last Two Years

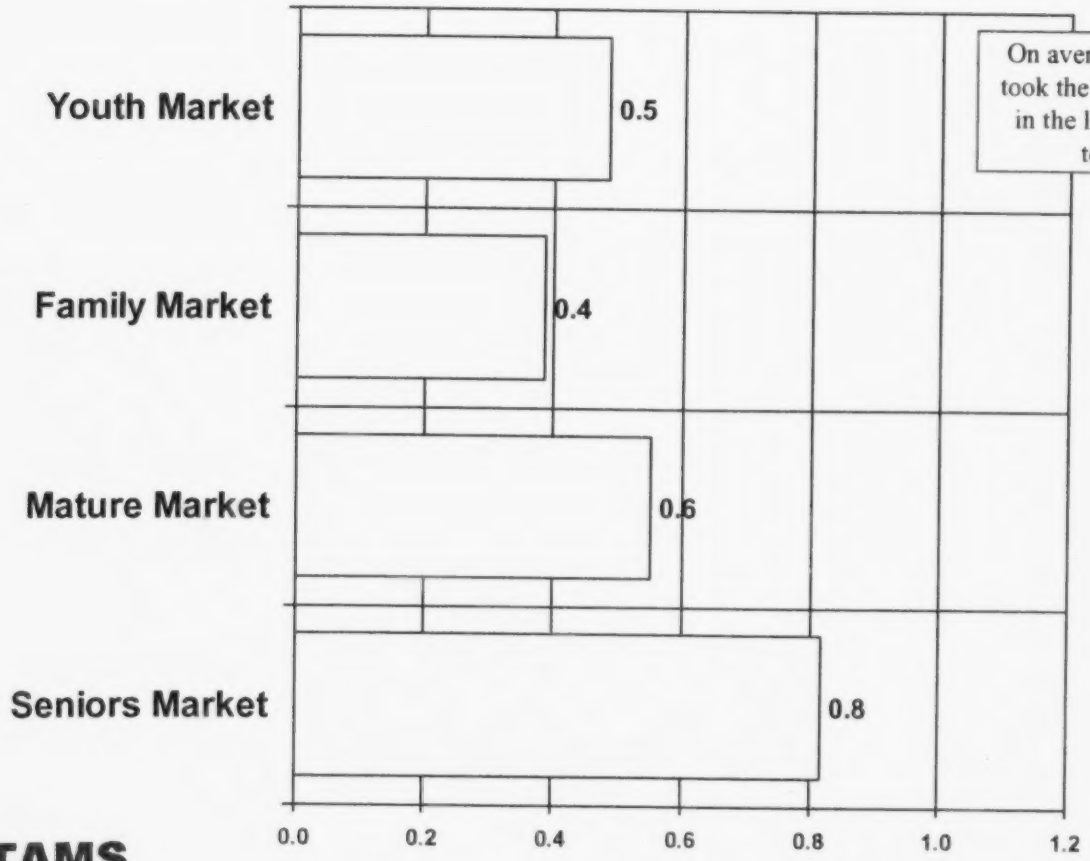


Among Canadians, the Youth Market took the greatest number of trips within Canada, although this segment was more likely to travel within respondents' own provinces than the Mature and Seniors Markets. The Family Market took the highest percentage of trips within respondents' own provinces reflecting the fact that travel with children is often short-haul. Proportionally, the Canadian Seniors Market took the fewest Canadian trips within respondents' own provinces.

TAMS: Lifecycle Markets

Lifecycle Markets
Average Number of Canadian Trips Taken By Americans in Last Two Years

Base: Percent of Adult American Population (18-Plus) Who Took an Overnight Trip in Last Two Years



On average, the American Seniors Market took the greatest number of trips to Canada in the last two years. The Family Market took the fewest trips overall.

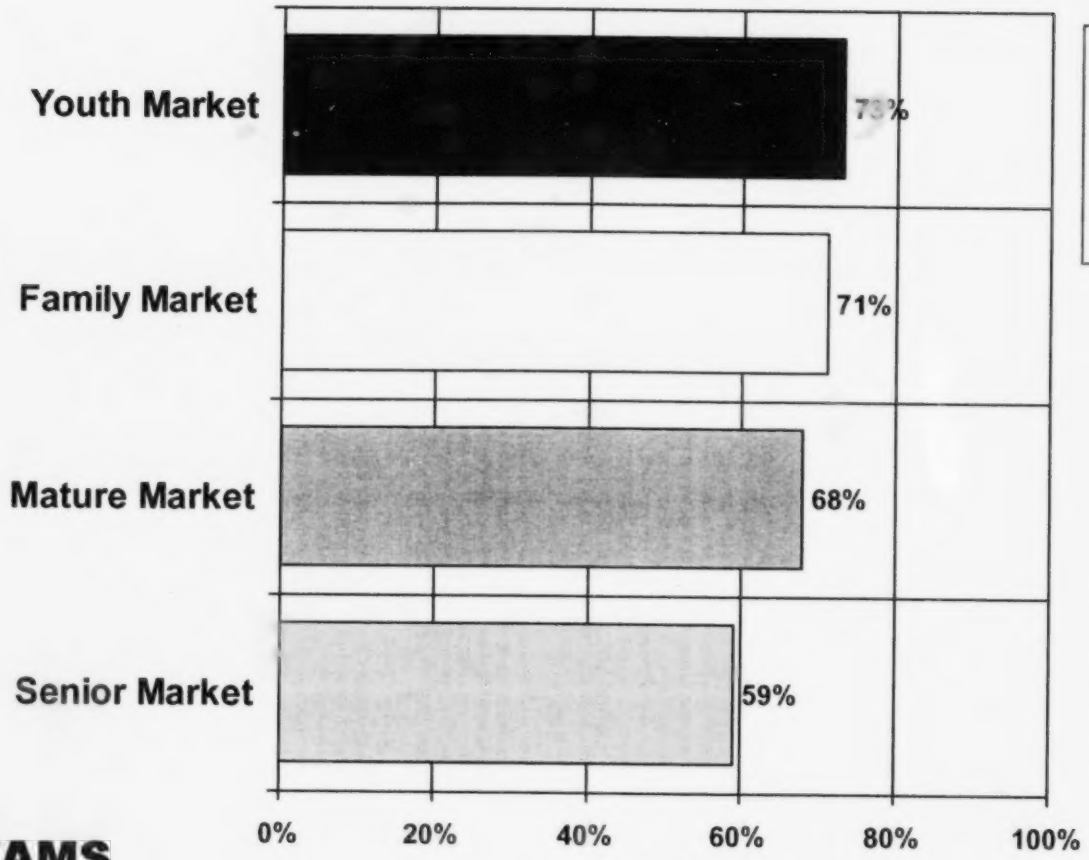
Technical Note

The estimated number of trips was determined by summing up the number of times selected destinations were visited in the last two years. Therefore, if the respondent visited multiple destinations on the same trip, it was counted as more than one trip, hence overestimating trips. On the other hand, the survey was restricted to people 18 and older, and therefore excluded trips taken by those 17 and under. This tended to under-estimate the number of trips taken.

Lifecycle Markets: Canada

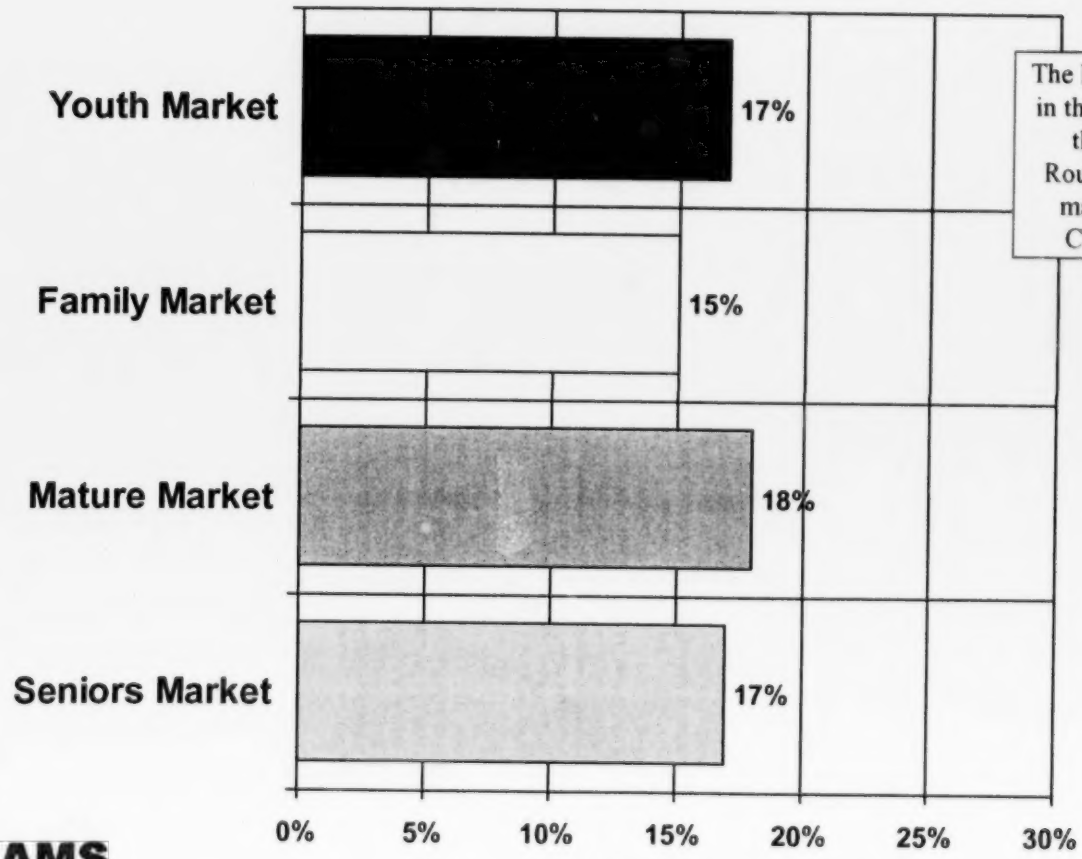
Percent Very Likely to Take Canadian Trip in Next Two Years

Base: Percent of Adult Canadian Population (18-Plus) Who Took an Overnight Trip in Last Two Years



Among Canadians, intentions to take a trip within Canada in the next two years decreased slightly as the age of the respondent increased. The Seniors Market was the least likely to express intentions to take an trip within Canada over the next two years.

Lifecycle Markets: United States
Percent Very Likely to Take Canadian Trip in Next Two Years
Base: Percent of Adult American Population (18-Plus) Who Took an Overnight Trip in Last Two Years



The likelihood of taking a trip to Canada in the next two years varied little across the American Lifecycle Markets. Roughly one-in-six in each of the four markets was very likely to travel to Canada during the next two years.

Destination Image Mapping

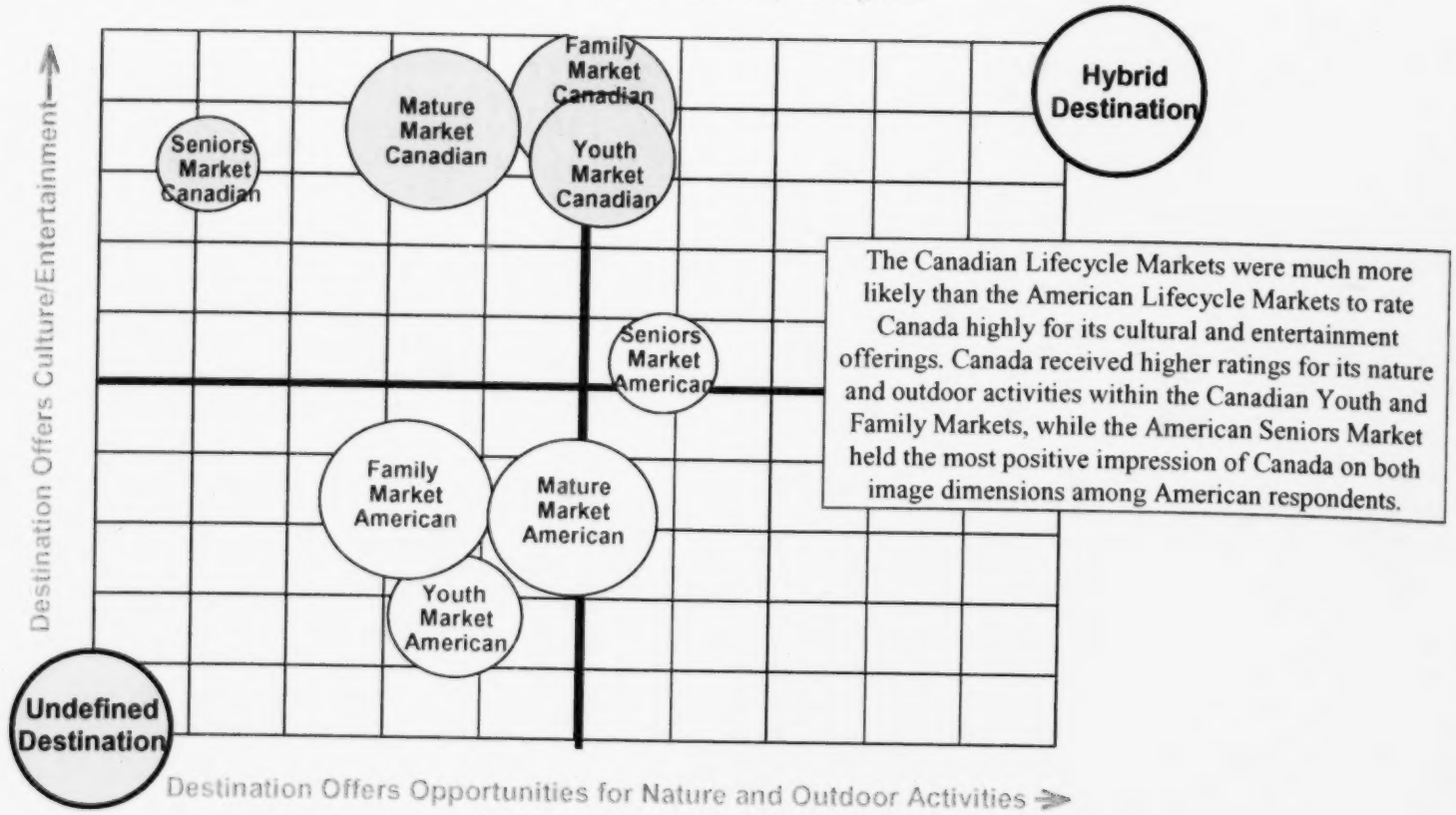
— Technical Explanation —

Respondents were asked to assess the image of Canada and Ontario on a 10-point rating scale for 25 image attributes. These ratings were factor-analysed to identify general image dimensions upon which Canada and Ontario were evaluated (See Appendix Eight for more details). The values of Canada and Ontario were plotted on a destination map to indicate the positioning of Canada for each type of respondent. If Canada or Ontario is shown in the upper left quadrant it is considered to offer excellent opportunities to experience culture and entertainment activities, but less likely to provide opportunities to experience nature or participate in outdoor activities. If Canada or Ontario is shown in the lower right quadrant, it is considered to offer excellent opportunities to experience nature and participate in outdoor activities, but fewer opportunities for cultural experiences or entertainment. When Canada or Ontario is shown in the upper right quadrant, it is perceived as a hybrid destination offering opportunities for both nature/outdoor experiences and culture/entertainment experiences. On the other hand, when Canada or Ontario is shown in the lower left quadrant, it is either not well known or has weak imagery on both image dimensions.

Lifecycle Markets
Vacation Image of Canada

Base: Total Population (18-Plus) Who Took an Overnight Trip in Last Two Years and Were Able to Rate Canada on One-Plus Attributes: Canada and United States (Mailback Survey)

Circle Size Denotes Size of the Segment

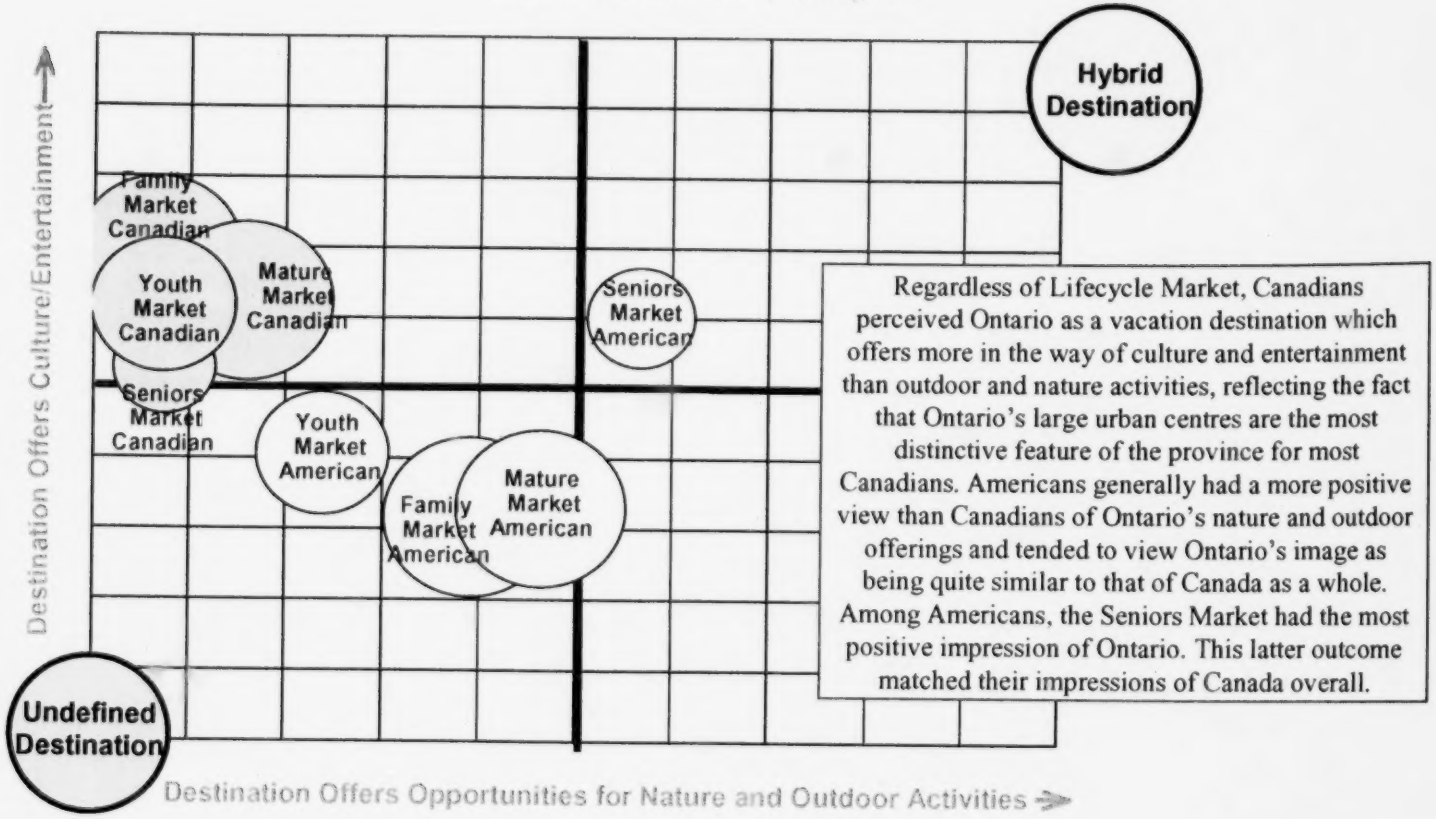


The Canadian Lifecycle Markets were much more likely than the American Lifecycle Markets to rate Canada highly for its cultural and entertainment offerings. Canada received higher ratings for its nature and outdoor activities within the Canadian Youth and Family Markets, while the American Seniors Market held the most positive impression of Canada on both image dimensions among American respondents.

Lifecycle Markets
Vacation Image of Ontario

Base: Total Population (18-Plus) Who Took an Overnight Trip in Last Two Years and Were Able to Rate Canada on One-Plus Attributes; Canada and United States (Mailback Survey)

Circle Size Denotes Size of the Segment



Regardless of Lifecycle Market, Canadians perceived Ontario as a vacation destination which offers more in the way of culture and entertainment than outdoor and nature activities, reflecting the fact that Ontario's large urban centres are the most distinctive feature of the province for most Canadians. Americans generally had a more positive view than Canadians of Ontario's nature and outdoor offerings and tended to view Ontario's image as being quite similar to that of Canada as a whole. Among Americans, the Seniors Market had the most positive impression of Ontario. This latter outcome matched their impressions of Canada overall.

Section Three

Youth Market

Detailed Lifecycle Market Profile

Youth Market

The Youth Market accounted for 20 percent of the total travel market. Men were somewhat over-represented in the market. Because the Youth Market tended to be in the early stages of career development, they tended to report lower household incomes despite being the best-educated of the four Lifecycle Markets.

The Youth Market exhibits good growth potential for the Canadian travel industry. Both the Canadian and American Youth Markets were more likely than average to express intentions of travelling in Canada over the next two years. Moreover, the Canadian Youth Market was much more likely to have travelled within Canada during the past two years and especially within respondents' own provinces.

The Youth Market exhibited a high-energy approach to travel, both in terms of the activities sought and in the vacation experiences sought over the last two years. Relative to the average traveller, the Youth Market was especially likely to have sought out personal indulgence vacation experiences (e.g., shopping, fine dining, nightlife).

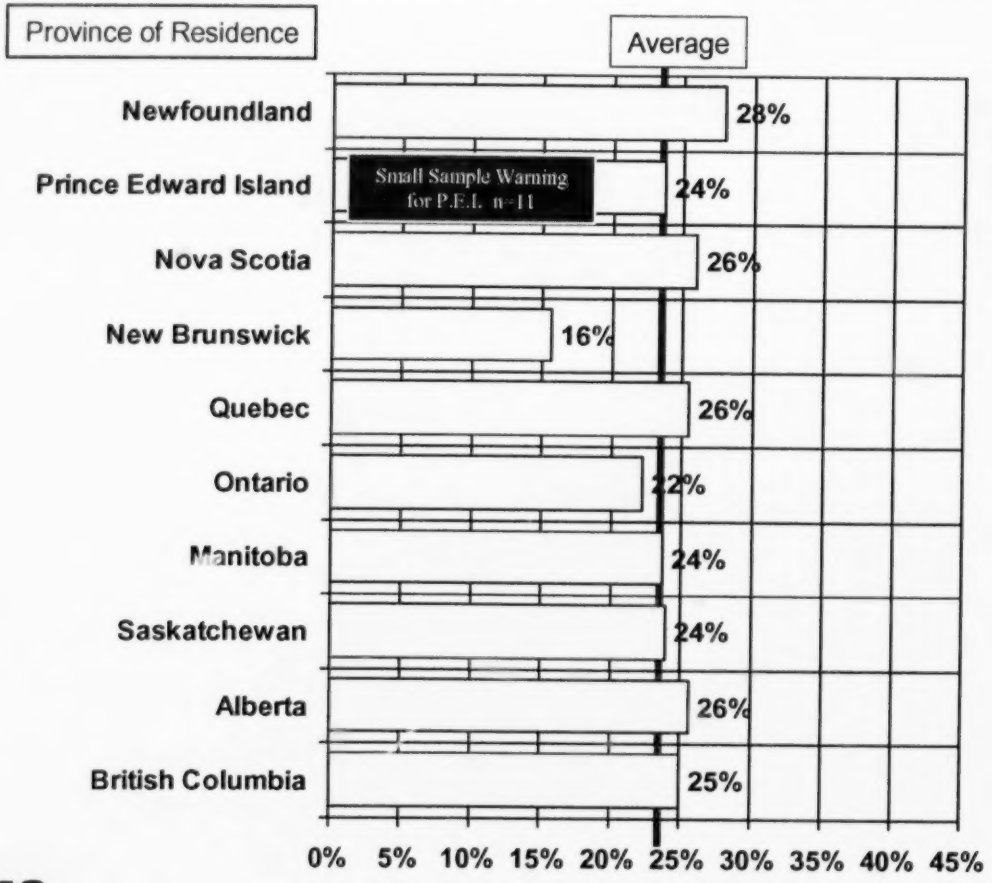
The Youth Market was more active than the average traveller in a broad range of outdoor, cultural and entertainment vacation pursuits. In terms of outdoor activities, the Youth Market exhibited above-average participation in extreme winter sports, fitness activities, canoeing, kayaking or hiking, team sports and biking. Members were also more likely than the average to have attended concerts, carnivals and festivals while travelling during the past two years. Either to save money or to enjoy the outdoors, the Youth Market was also more likely than others to camp in public campgrounds or in wilderness areas.

The Youth Market tended to consult a broad range of information sources when planning vacations. Respondents were the most likely from the four lifecycle markets to use the Internet as a research tool and to have booked travel arrangements using the Internet. Other information sources used more often by the Youth Market than the average traveller included travel agents, travel guidebooks and television programmes and television advertising.

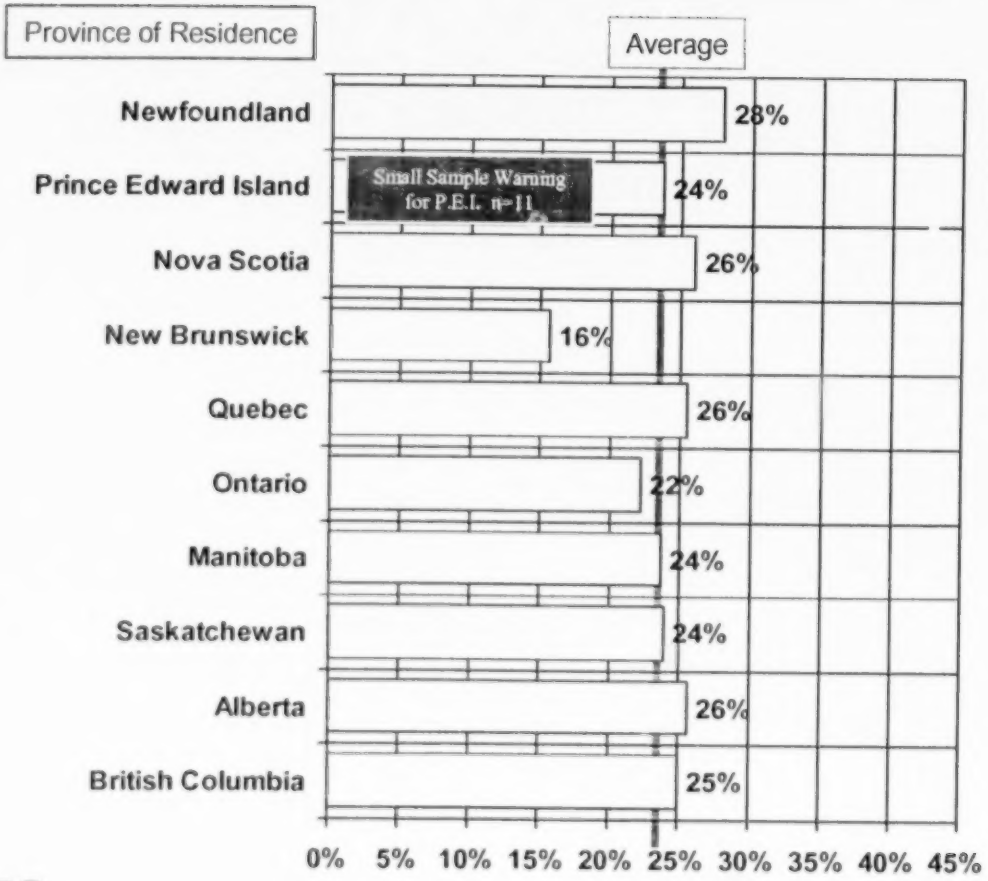
Perhaps reflecting the overrepresentation of men in this market, the Youth Market was more likely than average to read sports magazines. They were also above-average viewers of evening situation comedies on television.

Lifecycle Markets Incidence in Canada
Youth Market: By Province

Base: Adult (18-Plus) Canadian Population Who Took a Trip or Plans to Take a Trip in Last/Next Two Years



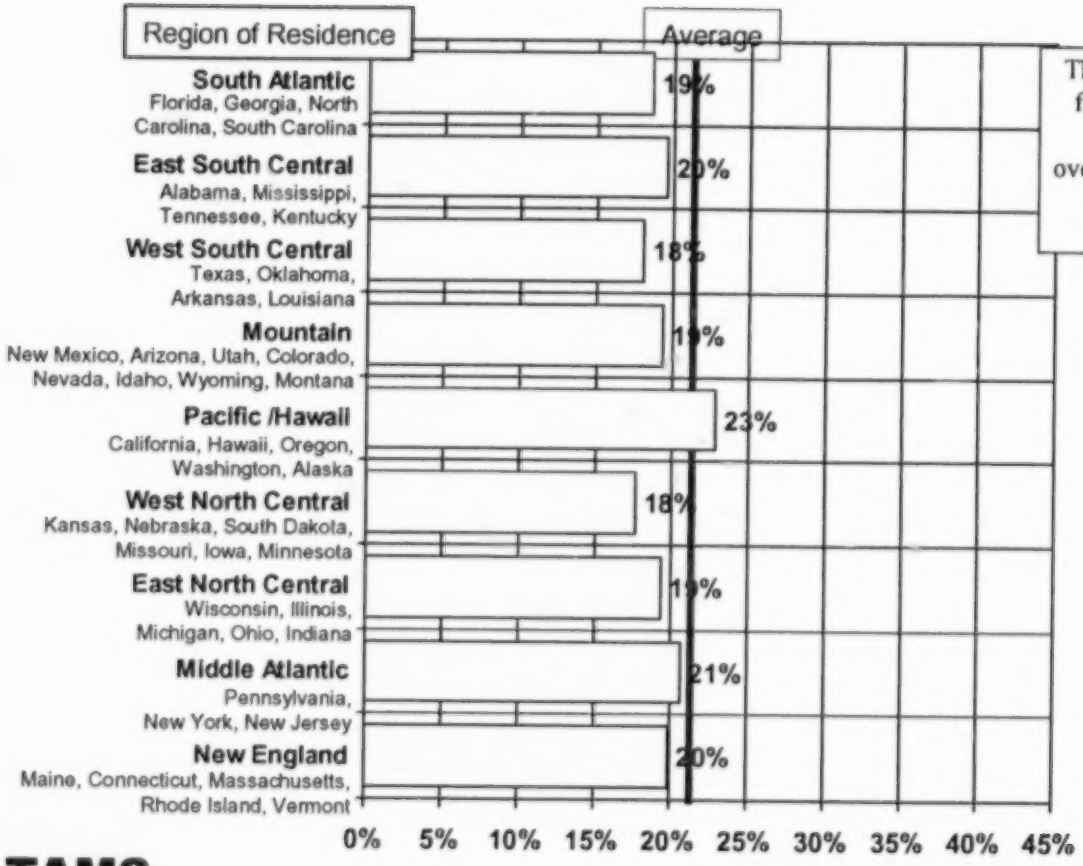
The Youth Market accounted for roughly one-quarter of the travel market in almost all parts of the country. The Youth Market was underrepresented only in New Brunswick.



The Youth Market accounted for roughly one-quarter of the travel market in almost all parts of the country. The Youth Market was underrepresented only in New Brunswick.

Lifecycle Markets Incidence in United States
Youth Market: By U.S. Region

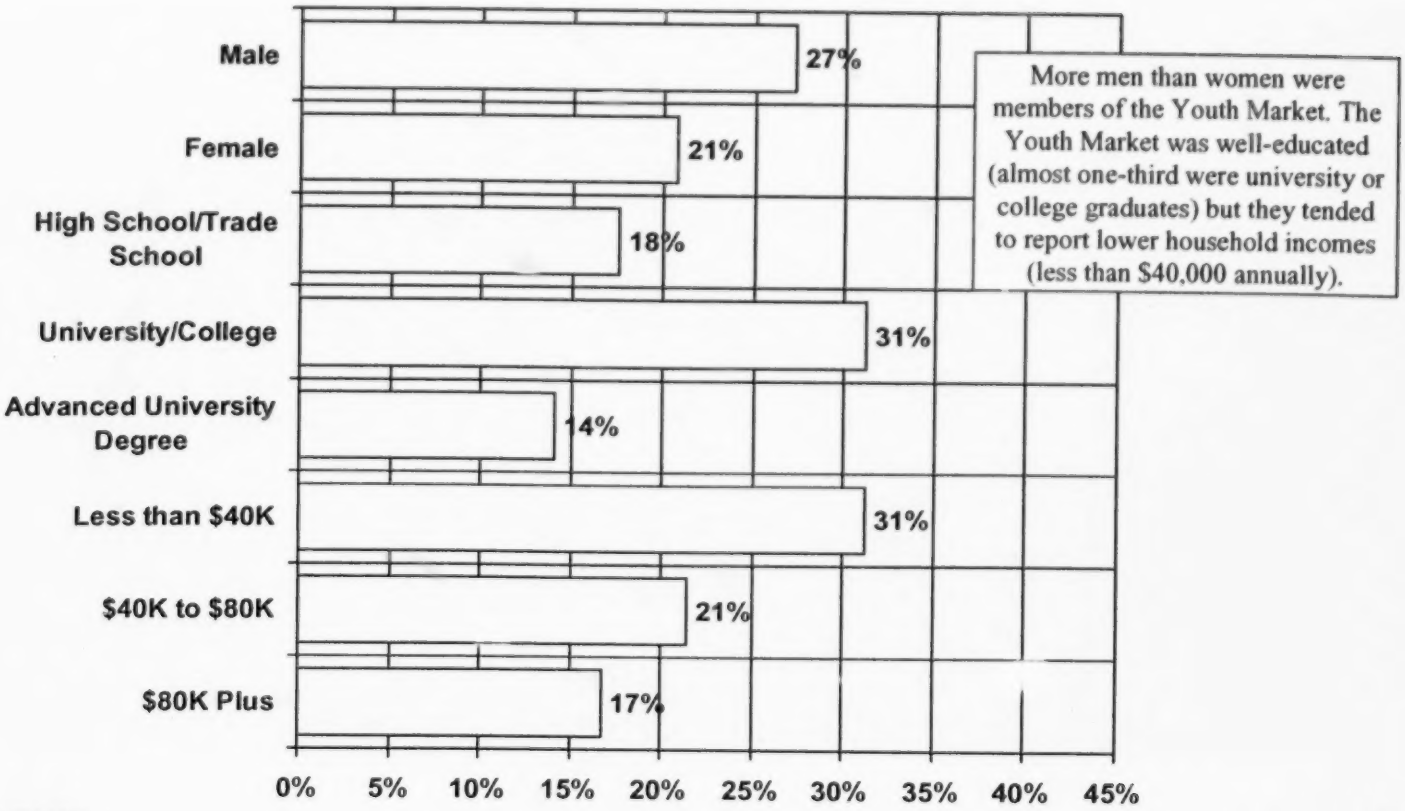
Base: Adult (18-Plus) American Population Who Took a Trip or Plans to Take a Trip in Last/Next Two Years



The Youth Market accounted for roughly one-fifth of the population in most regions of the United States. They were slightly overrepresented, however, in the Pacific/Hawaii region where the Youth Market was 22.8 percent of the overall market.

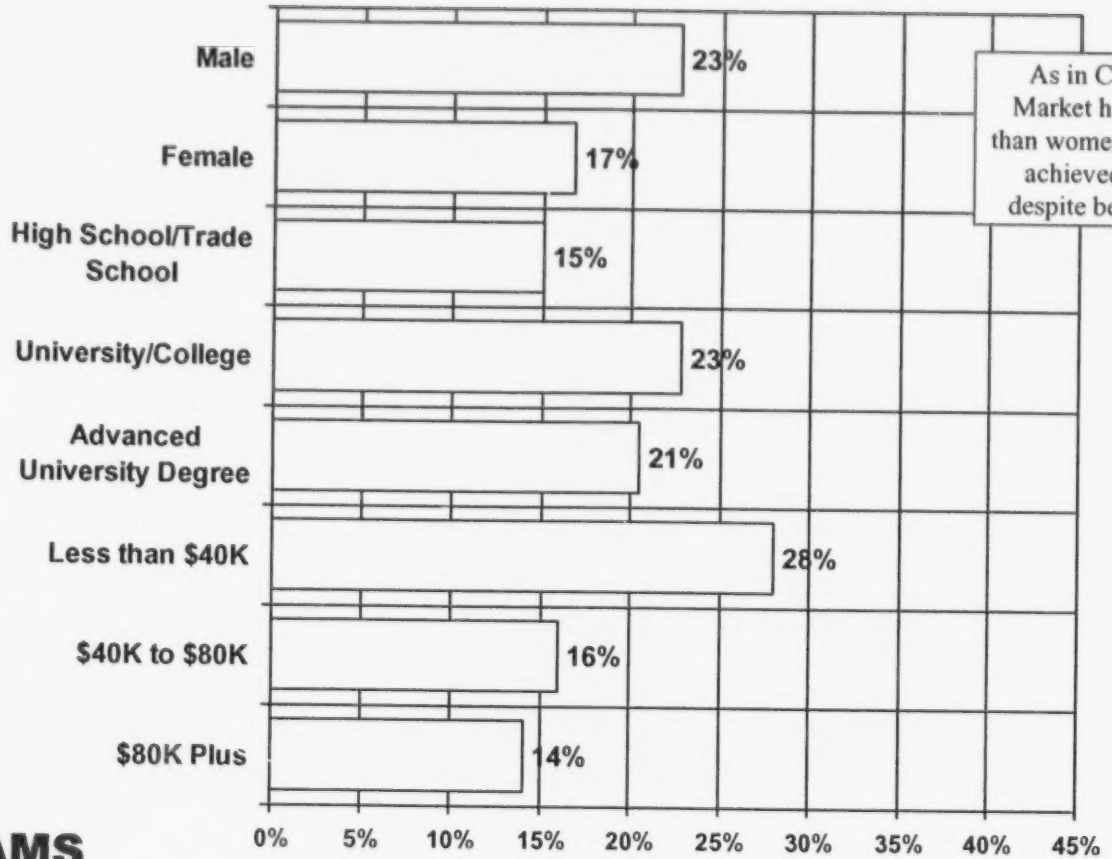
Lifecycle Markets: Youth Market
Canada: By Demographics

Base: Percent of Population (18-Plus) Who Either Travelled in Last Two Years
Or Intends to Travel in Next Two Years



Lifecycle Markets: Youth Market
United States: By Demographics

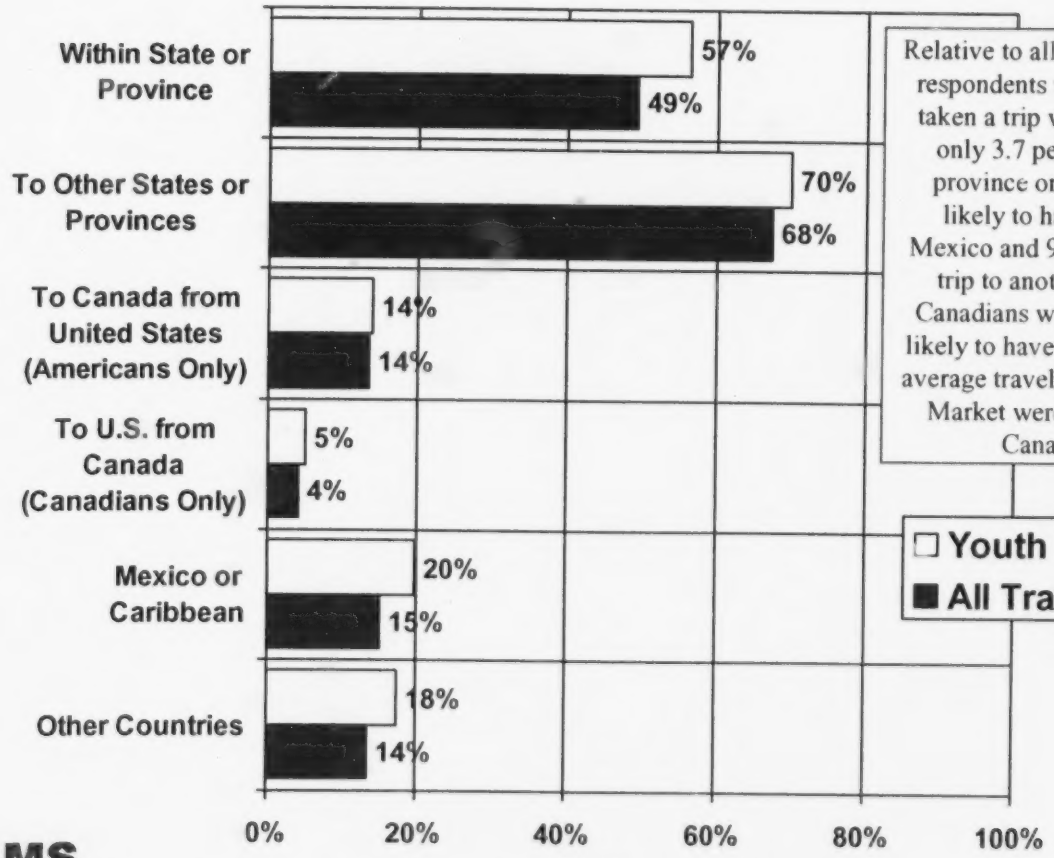
Base: Percent of Population (18-Plus) Who Either Travelled in Last Two Years Or Intends to Travel in Next Two Years



As in Canada, the American Youth Market had a higher incidence of men than women. This market had also not yet achieved higher household incomes despite being relatively well-educated.

Youth Market
Percent Taking Overnight Pleasure Trips
To Various Destinations in the Last Two Years

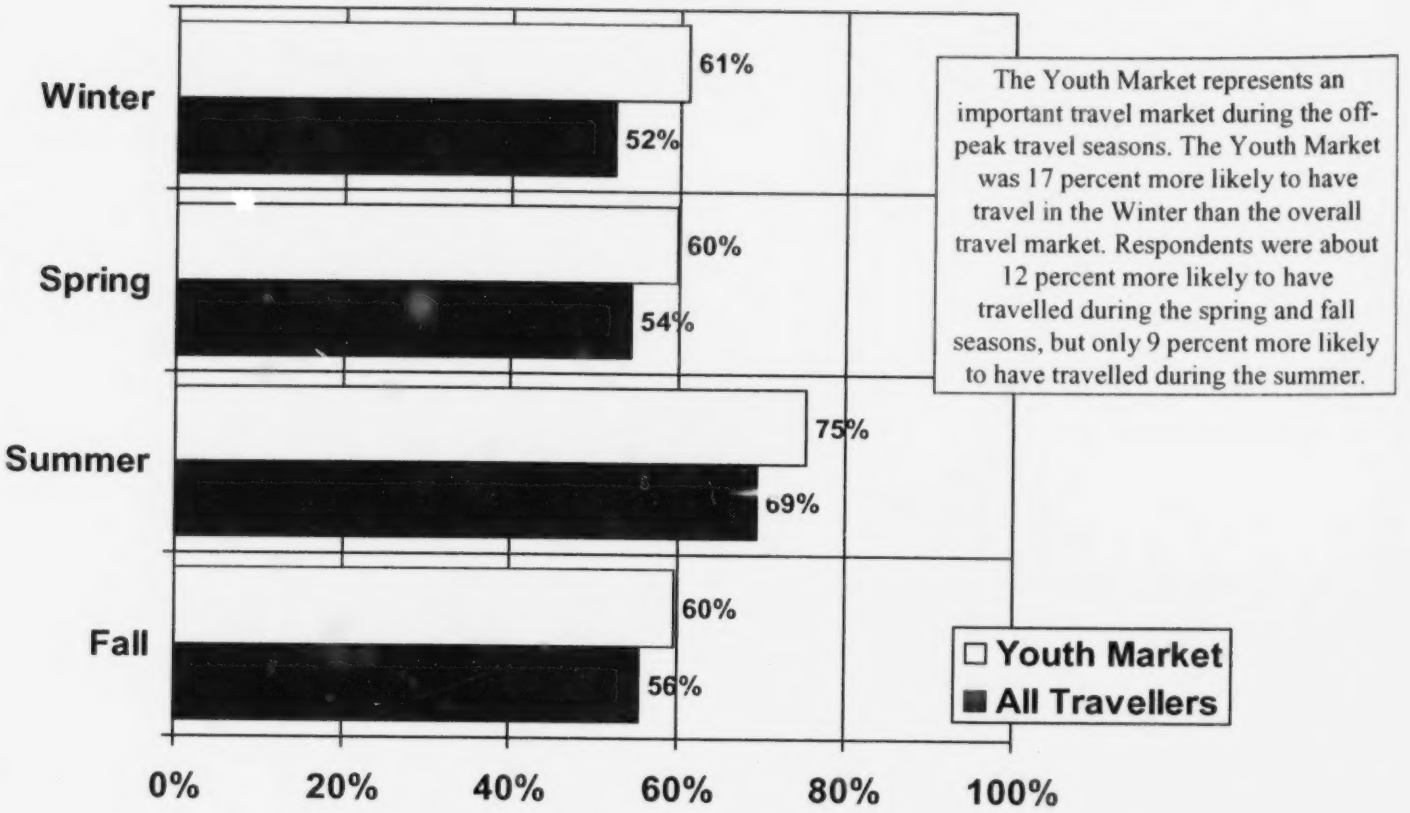
Base: Adult (18-Plus) American/Canadian Population Who Took an Overnight Trip in the Last Two Years



Relative to all vacation travellers, The Youth Market respondents were 16.7 percent more likely to have taken a trip within their own state or province, but only 3.7 percent to have taken a trip to another province or state. They were 30.4 percent more likely to have taken a trip to the Caribbean or Mexico and 9.6 percent more likely to have taken a trip to another overseas country. However, the Canadians within the Youth Market were no more likely to have travelled to the United States than the average traveller. Similarly, Americans in the Youth Market were no more likely to have travelled to Canada than the average traveller.

Youth Market
Percent Taking Overnight Pleasure Trips To Various Destinations by Season in Last Two Years

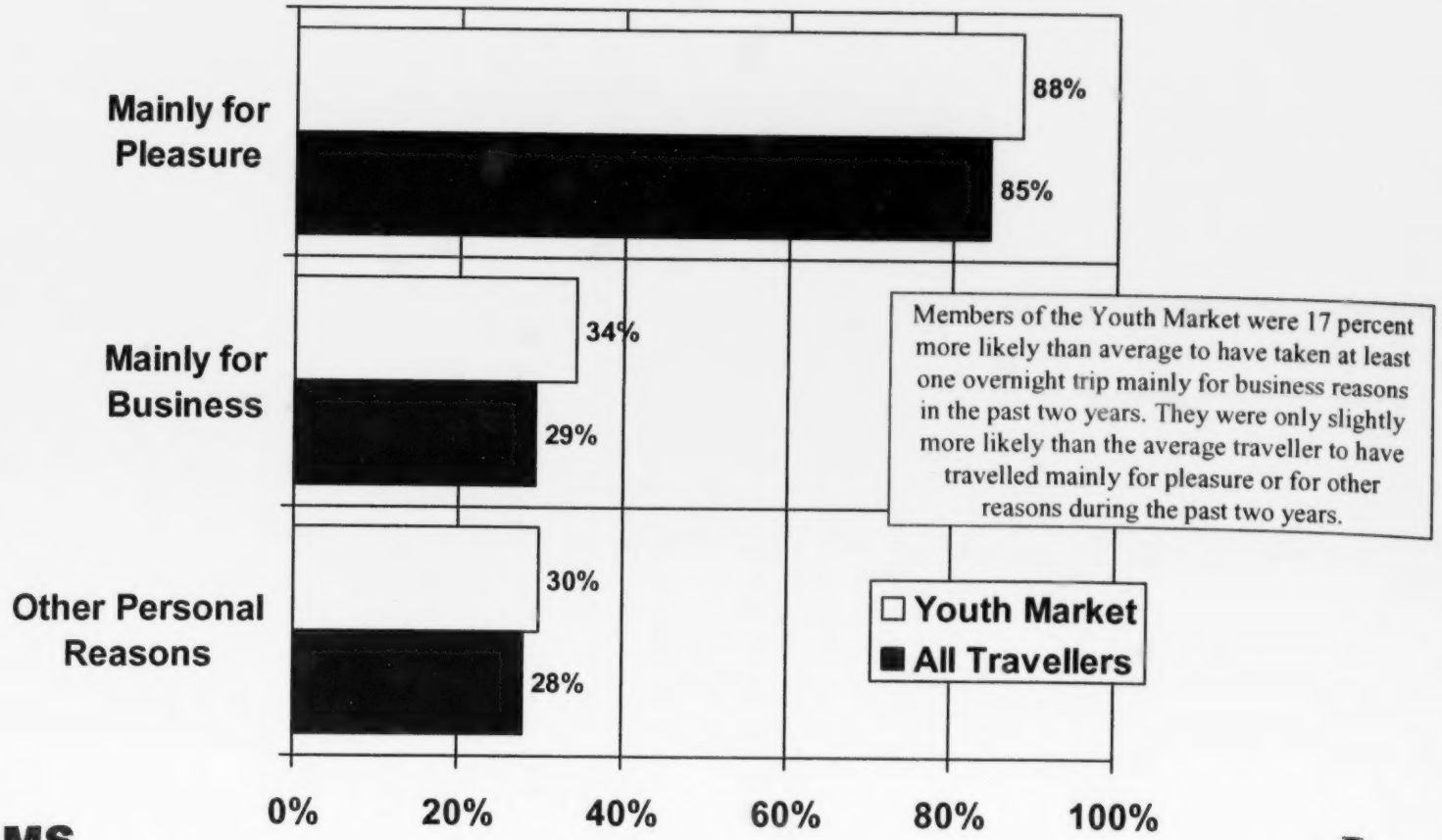
Base: Adult (18-Plus) American/Canadian Population Who Took an Overnight Trip in Last Two Years



The Youth Market represents an important travel market during the off-peak travel seasons. The Youth Market was 17 percent more likely to have travel in the Winter than the overall travel market. Respondents were about 12 percent more likely to have travelled during the spring and fall seasons, but only 9 percent more likely to have travelled during the summer.

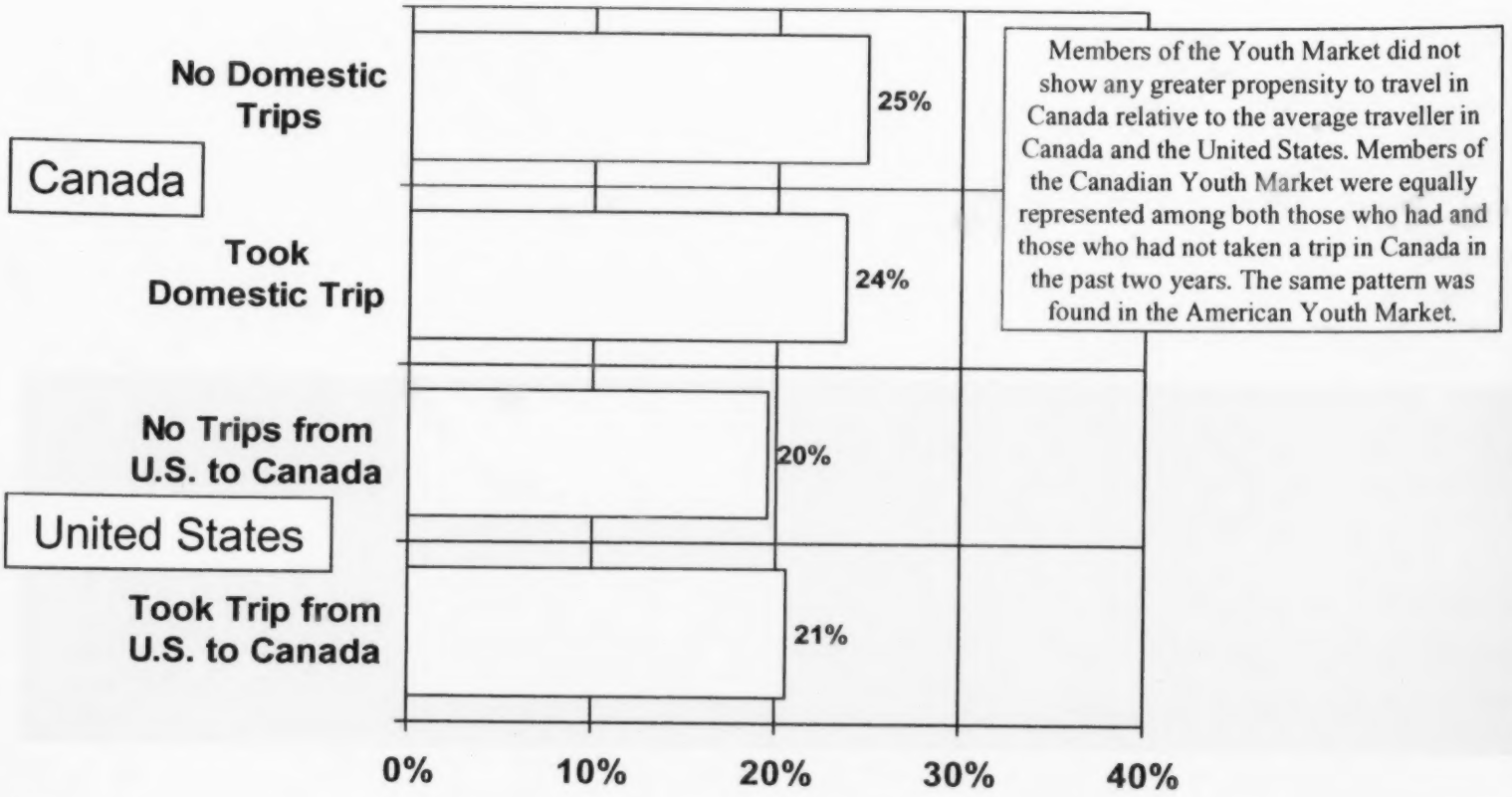
Percent Taking Overnight Pleasure Trip to Various Destinations For Various Reasons in Last Two Years

Base: Adult (18-Plus) American/Canadian Population Who Took an Overnight Trip in Last Two Years



Youth Market
Canada vs. U.S.: By Trips in Canada in Last Two Years, Percent Taking at Least One Trip in Canada in Last Two Years

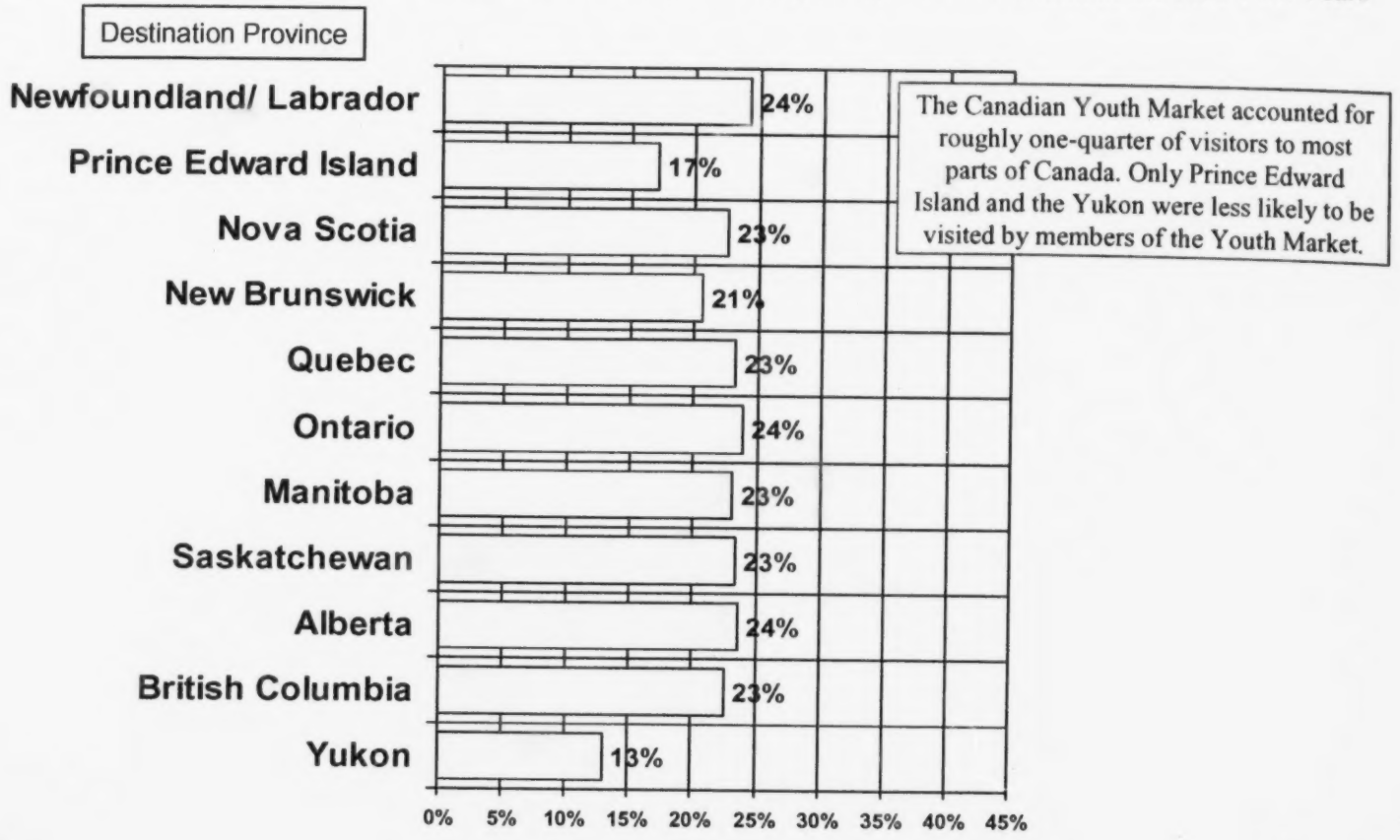
Base: Percent of Population (18-Plus) Who Either Travelled in Last Two Years Or Intend to Travel in Next Two Years



Members of the Youth Market did not show any greater propensity to travel in Canada relative to the average traveller in Canada and the United States. Members of the Canadian Youth Market were equally represented among both those who had and those who had not taken a trip in Canada in the past two years. The same pattern was found in the American Youth Market.

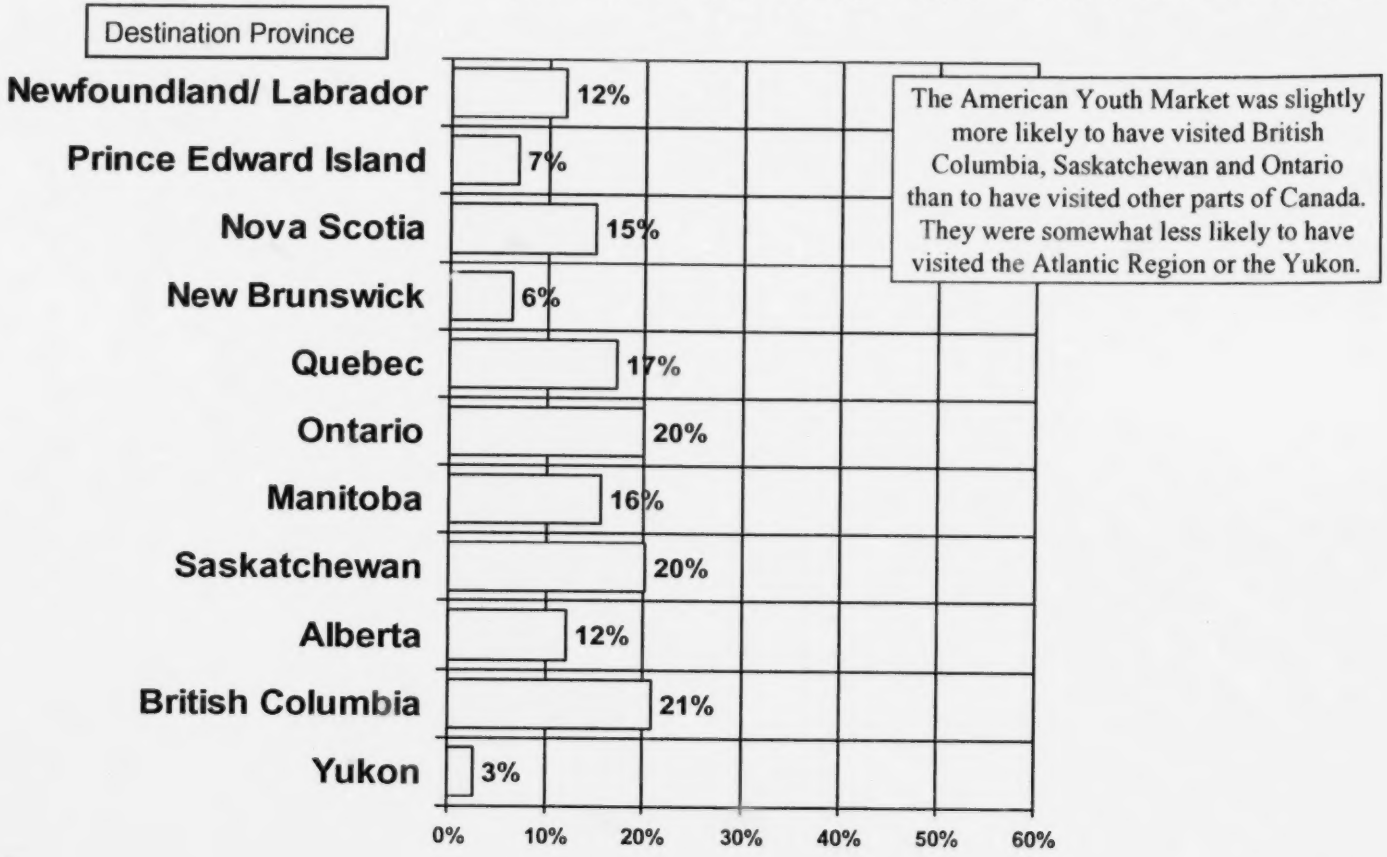
Percent of Canadians Taking an Overnight Pleasure Trip To Various Provinces in Last Two Years

Base: Adult (18-Plus) Canadian Population Who Took an Overnight Trip Within Canada in the Last Two Years



Percent of Americans Taking an Overnight Pleasure Trip To Various Provinces in Last Two Years

Base: Adult (18-Plus) American Population Who Took an Overnight Trip to Canada in the Last Two Years

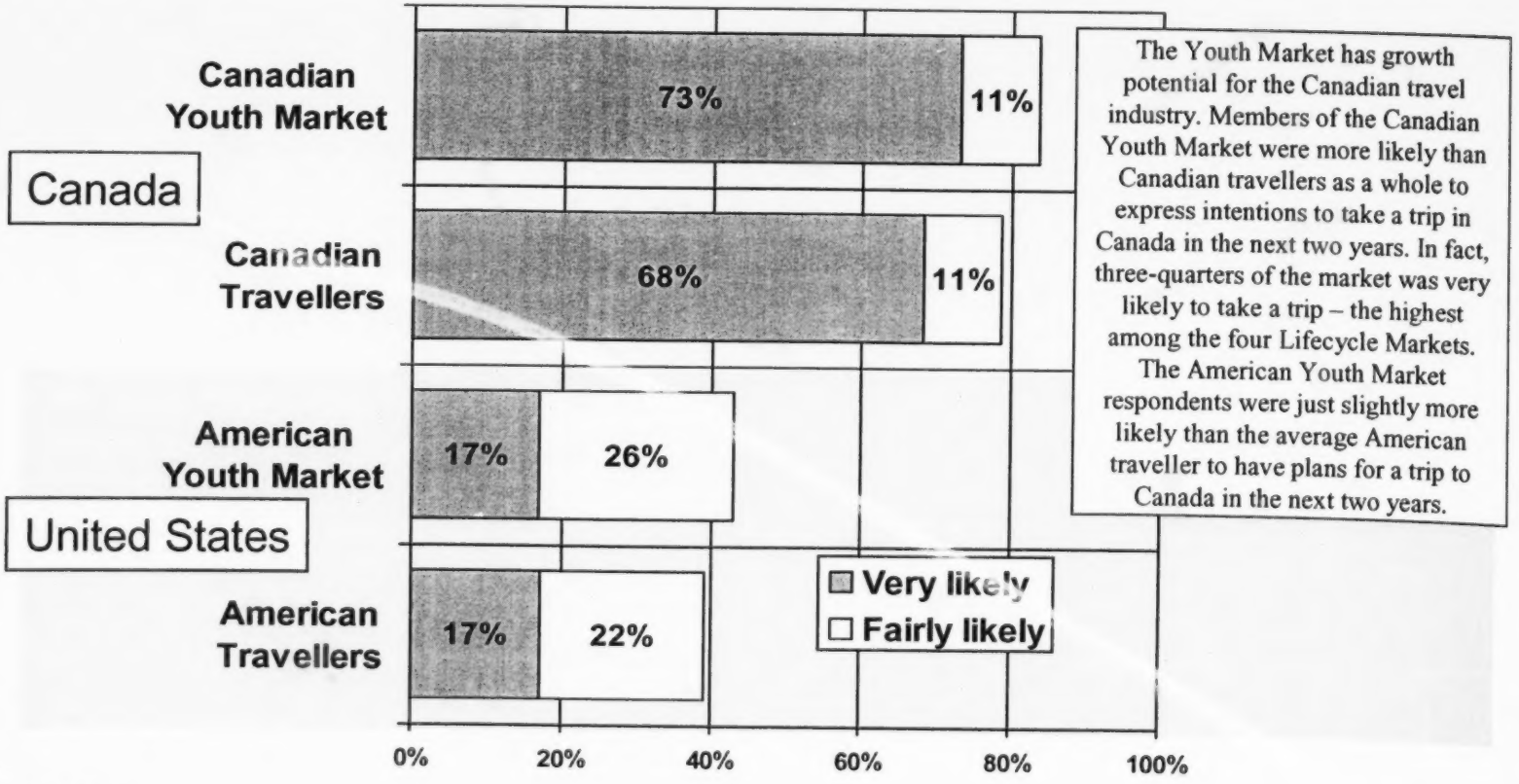


The American Youth Market was slightly more likely to have visited British Columbia, Saskatchewan and Ontario than to have visited other parts of Canada. They were somewhat less likely to have visited the Atlantic Region or the Yukon.

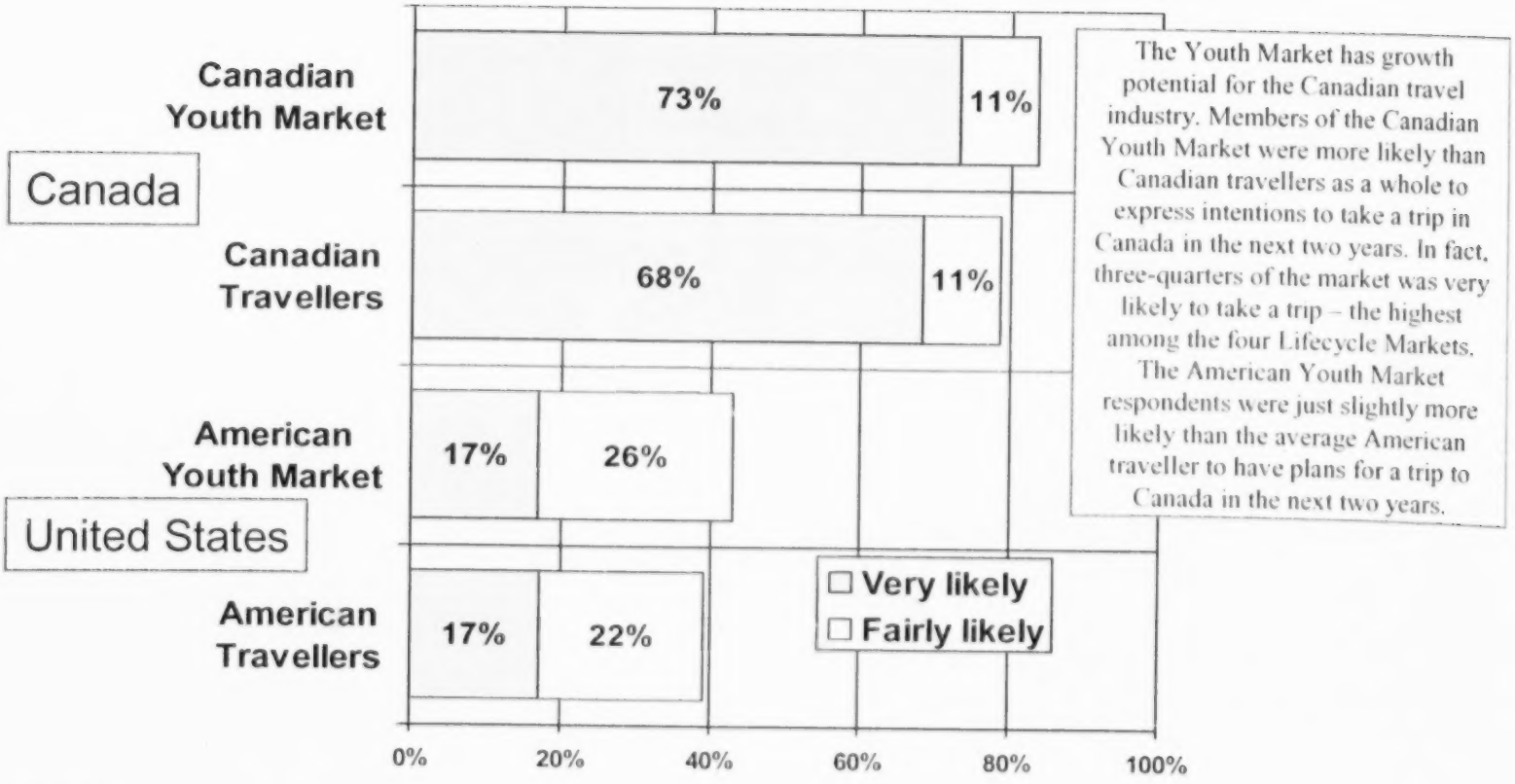
Lifecycle Markets

Youth Market: Intentions to Travel Within/To Canada In Next Two Years

Base: Adult Population (18-Plus) Who Took an Overnight Trip in Last Two Years



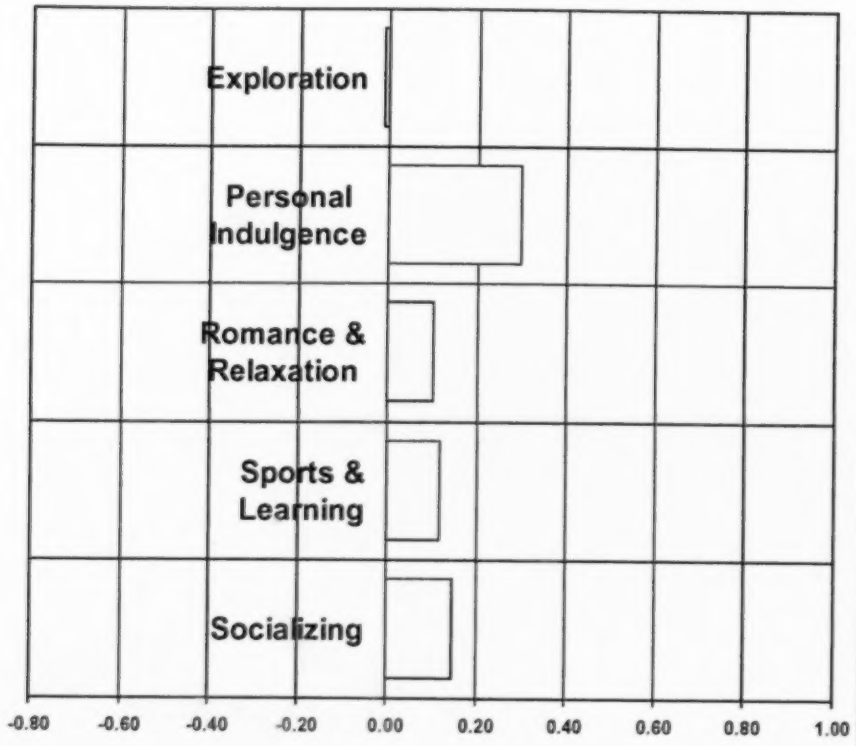
The Youth Market has growth potential for the Canadian travel industry. Members of the Canadian Youth Market were more likely than Canadian travellers as a whole to express intentions to take a trip in Canada in the next two years. In fact, three-quarters of the market was very likely to take a trip – the highest among the four Lifecycle Markets. The American Youth Market respondents were just slightly more likely than the average American traveller to have plans for a trip to Canada in the next two years.



The Youth Market has growth potential for the Canadian travel industry. Members of the Canadian Youth Market were more likely than Canadian travellers as a whole to express intentions to take a trip in Canada in the next two years. In fact, three-quarters of the market was very likely to take a trip – the highest among the four Lifecycle Markets. The American Youth Market respondents were just slightly more likely than the average American traveller to have plans for a trip to Canada in the next two years.

Youth Market
General Vacation Experiences Sought During Pleasure Travel in Last Two Years

Base: Total Population (18-Plus) Who Took an Overnight Trip in Last Two Years: Canada and United States (Mailback Survey)



Youth Market respondents were more likely than other travellers to be interested in opportunities to indulge themselves while on vacation (e.g., fine dining, enjoying nightlife). This market was also slightly more likely to enjoy 'romance and relaxation', sports and learning, and socializing with friends and family when on vacation.

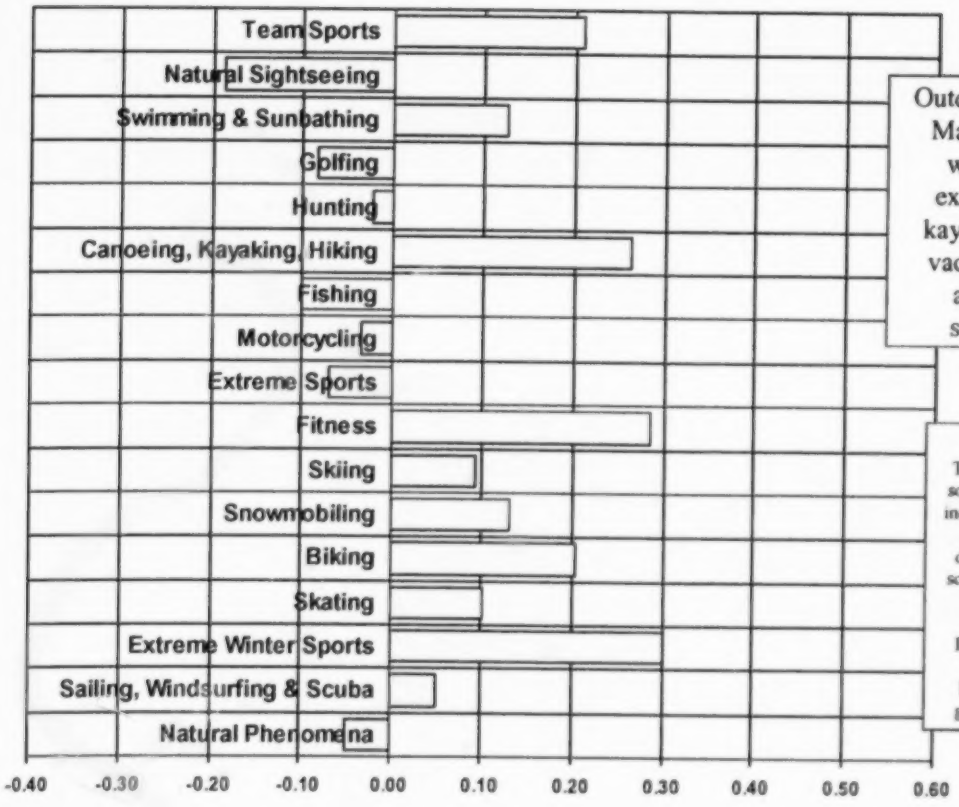
Technical Note

This analysis is based on a factor analysis of the vacation experiences sought during the past two years. See Appendix Three for a description of the individual items associated with each of these factor scores. The factor scores for each dimension were determined by the weighted sum of all items. The weight for each item was determined by how much the item correlated with the overall factor score. Factor scores were standardised with an average of "0" and a standard deviation of "1". A value of "0" means that the travellers in the group exhibited an average tendency to pursue a given vacation experience. Progressively more positive values indicate that the travellers in the group were progressively more likely to have pursued the vacation experience. Progressively more negative values indicate that the travellers within the group were progressively less likely to have pursued the vacation experience.

Youth Market

Outdoor Activities Sought During Pleasure Travel in Last Two Years

Base: Total Population (18-Plus) Who Took an Overnight Trip in Last Two Years:
Canada and United States (Mailback Survey)



Outdoor activities were a significant part of the Youth Market's vacations. Members of the Youth Market were much more likely than average to seek out extreme winter sports, fitness activities, canoeing, kayaking or hiking, team sports and biking while on vacation. Other outdoor vacation activities that had above-average appeal included snowmobiling, swimming and sunbathing, skating, and skiing.

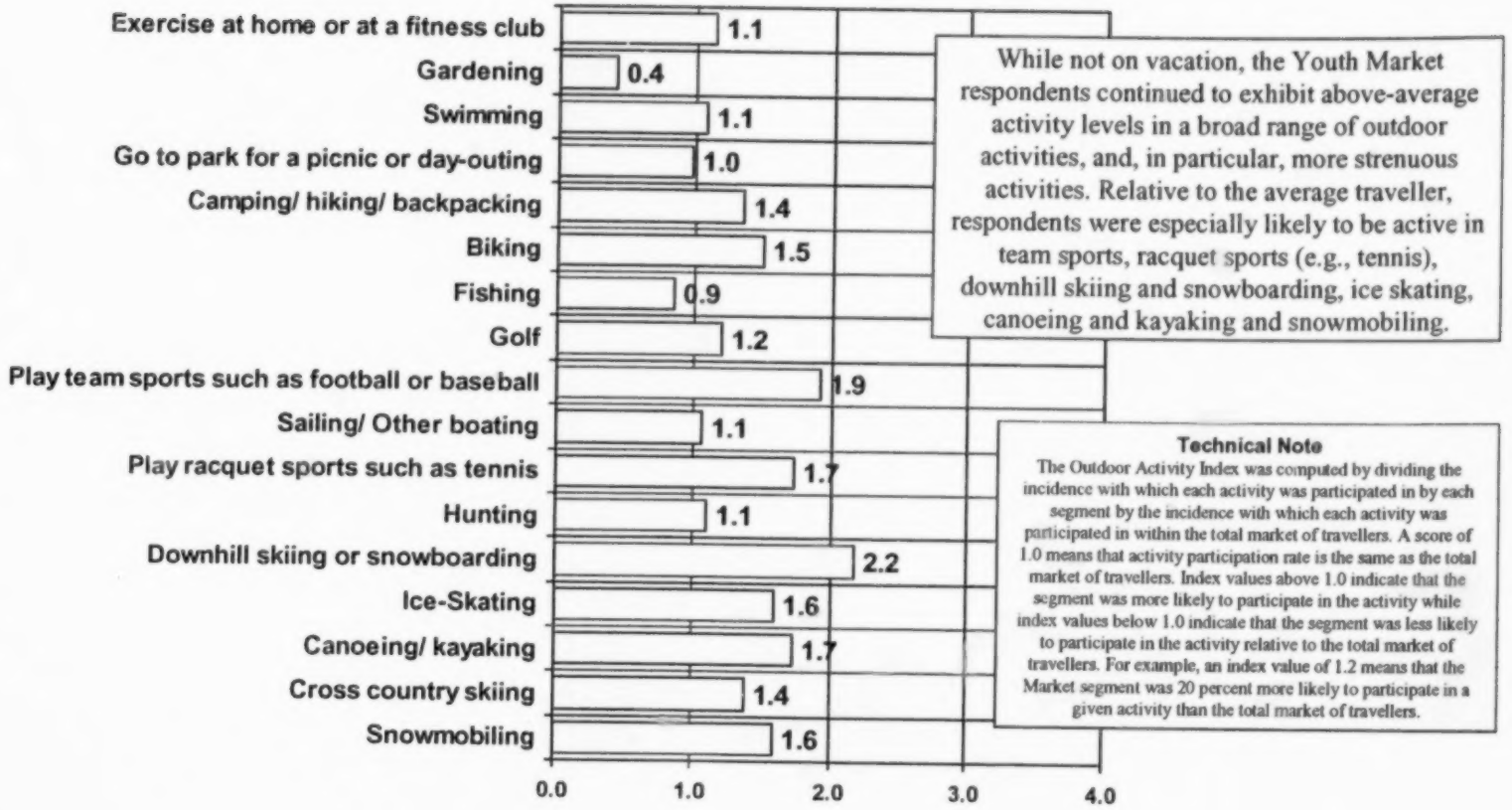
Technical Note

This analysis is based on a factor analysis of the outdoor vacation activities sought during the past two years. See Appendix Four for a description of the individual items associated with each of these factor scores. The factor scores for each dimension were determined by the weighted sum of all items determined by how much any given item correlated with the overall factor score. Factor scores were standardised with an average of "0" and a standard deviation of "1". A value of "0" means that the travellers in the group exhibited an average tendency to pursue a given vacation activity. Progressively more positive values indicate that the travellers in the group were progressively more likely to have pursued the vacation activity. Progressively more negative values indicate that the travellers within the group were progressively less likely to have pursued the vacation activity.

Youth Market

Outdoor Activities Sought While Not Travelling (Indexed)

Base: Total Population (18-Plus) Who Took an Overnight Trip in Last Two Years.
Canada and United States (Mailback Survey)



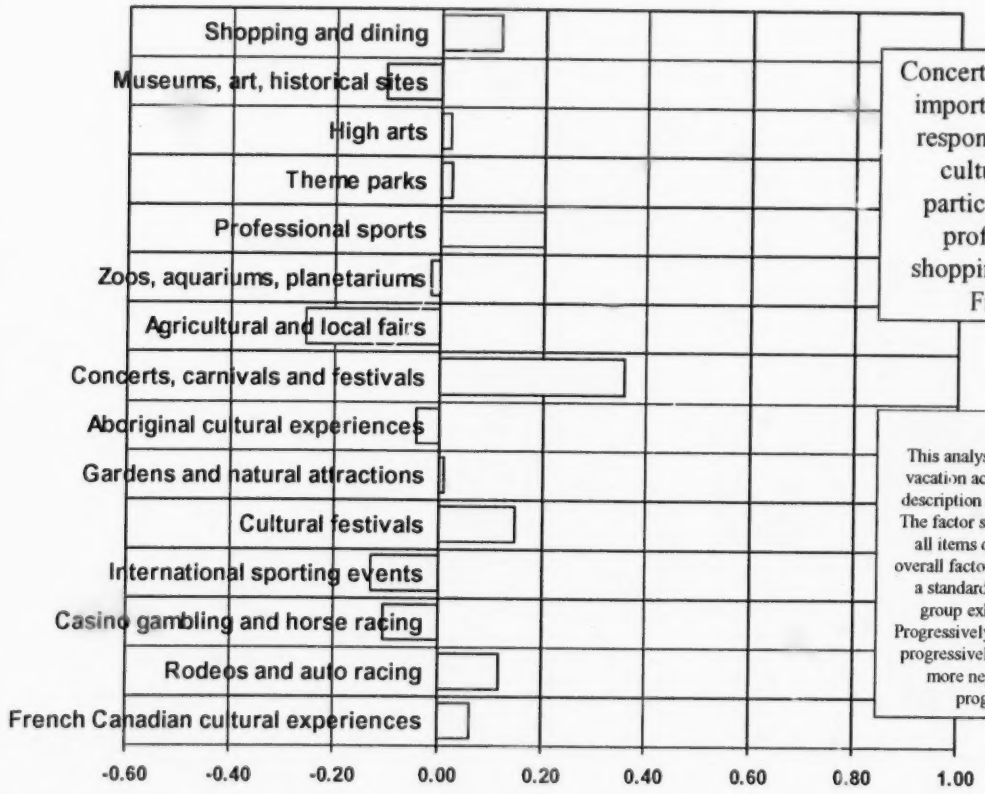
While not on vacation, the Youth Market respondents continued to exhibit above-average activity levels in a broad range of outdoor activities, and, in particular, more strenuous activities. Relative to the average traveller, respondents were especially likely to be active in team sports, racquet sports (e.g., tennis), downhill skiing and snowboarding, ice skating, canoeing and kayaking and snowmobiling.

Technical Note

The Outdoor Activity Index was computed by dividing the incidence with which each activity was participated in by each segment by the incidence with which each activity was participated in within the total market of travellers. A score of 1.0 means that activity participation rate is the same as the total market of travellers. Index values above 1.0 indicate that the segment was more likely to participate in the activity while index values below 1.0 indicate that the segment was less likely to participate in the activity relative to the total market of travellers. For example, an index value of 1.2 means that the Market segment was 20 percent more likely to participate in a given activity than the total market of travellers.

Youth Market
Culture and Entertainment Activities Sought During Pleasure Travel in the Last Two Years

Base: Total Population (18-Plus) Who Took an Overnight Trip in Last Two Years: Canada and United States (Mailback Survey)



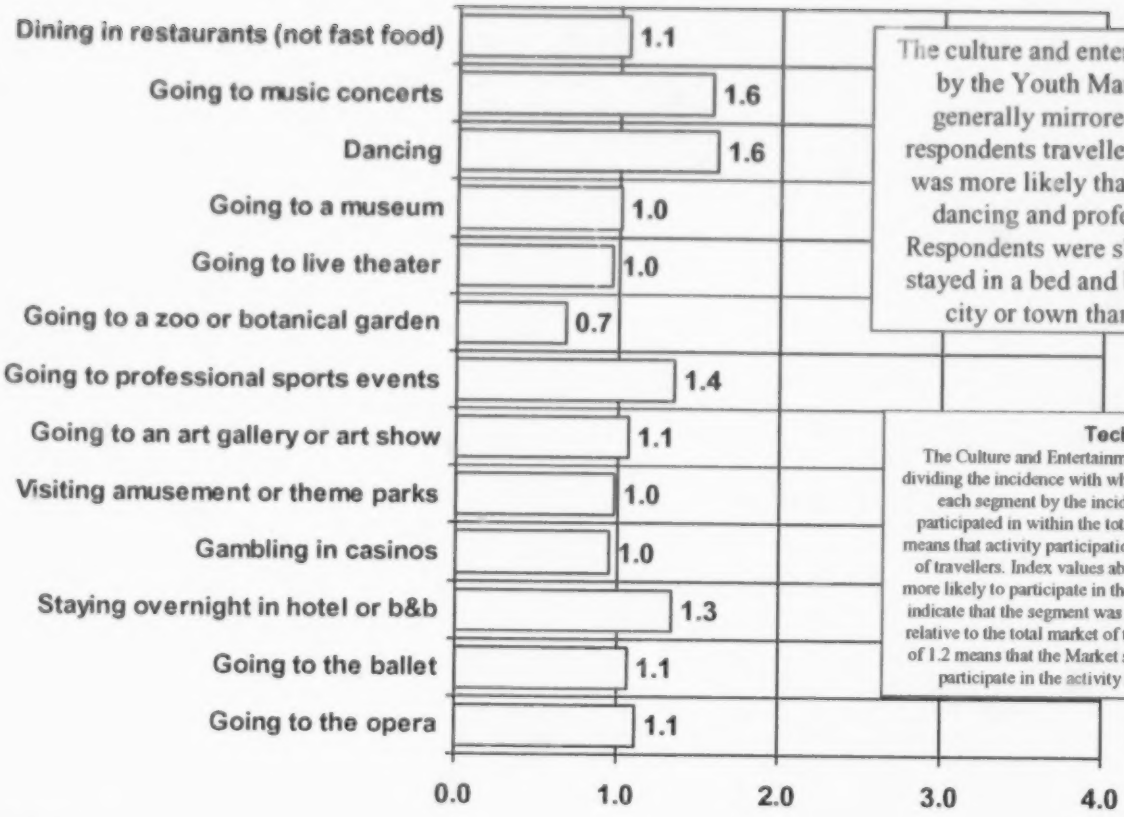
Concerts, carnivals and festivals were a much more important part of vacations for the Youth Market respondents than for the average traveller. Other culture and entertainment activities that had particular appeal to the Youth Market included professional sport events, cultural festivals, shopping and dining, rodeos and auto racing, and French Canadian cultural experiences.

Technical Note

This analysis was based on a factor analysis of the culture and entertainment vacation activities sought during the past two years. See Appendix Five for a description of the individual items associated with each of these factor scores. The factor scores for each dimension were determined by the weighted sum of all items determined by how much any given item was correlated with the overall factor score. Factor scores were standardised with an average of "0" and a standard deviation of "1". A value of "0" means that the travellers in the group exhibited an average tendency to pursue a given vacation activity. Progressively more positive values indicate that the travellers in the group were progressively more likely to have pursued the vacation activity. Progressively more negative values indicate that the travellers within the group were progressively less likely to have pursued the vacation activity.

Youth Market
Culture and Entertainment Activities Sought While Not Travelling (Indexed)

Base: Total Population (18-Plus) Who Took an Overnight Trip in Last Two Years: Canada and United States (Mailback Survey)



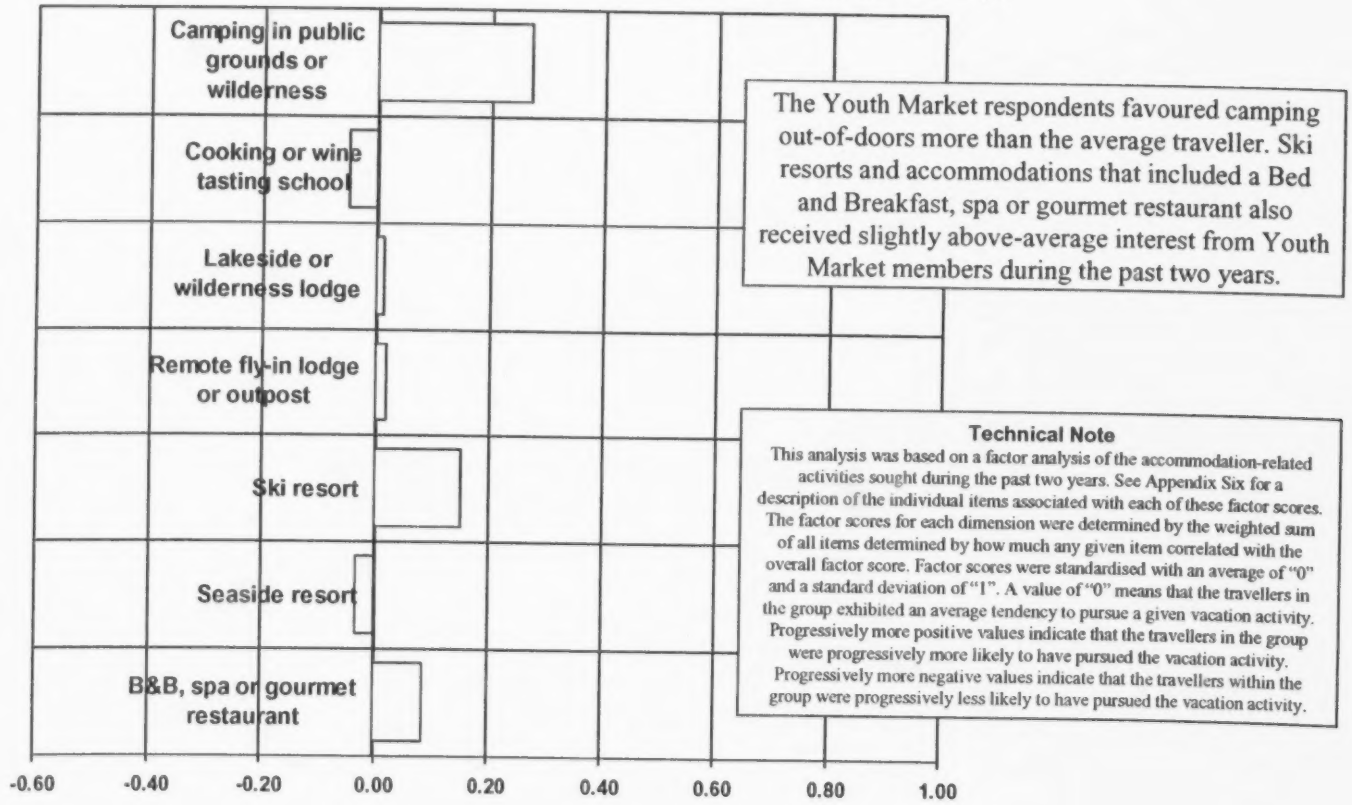
The culture and entertainment activities pursued by the Youth Market when not travelling generally mirrored those sought out when respondents travelled. Thus, the Youth Market was more likely than others to go to concerts, dancing and professional sporting events. Respondents were slightly more likely to have stayed in a bed and breakfast within their own city or town than the average traveller.

Technical Note

The Culture and Entertainment Activity Index was computed by dividing the incidence with which each activity was participated in by each segment by the incidence with which each activity was participated in within the total market of travellers. A score of 1.0 means that activity participation rate was the same as the total market of travellers. Index values above 1.0 indicate that the segment was more likely to participate in the activity while index values below 1.0 indicate that the segment was less likely to participate in the activity relative to the total market of travellers. For example, an index value of 1.2 means that the Market segment was 20 percent more likely to participate in the activity than the total market of travellers.

Youth Market
Accommodation-Related Activities Sought During Pleasure Travel in the Last Two Years

Base: Total Population (18-Plus) Who Took an Overnight Trip in Last Two Years: Canada and United States (Mailback Survey)



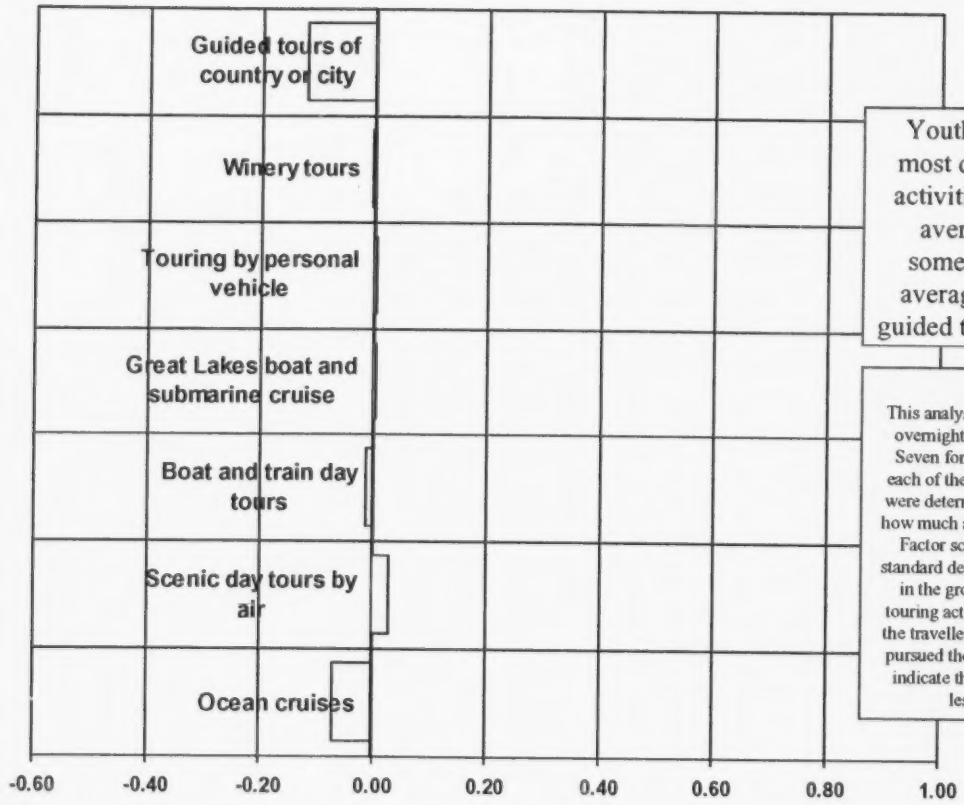
The Youth Market respondents favoured camping out-of-doors more than the average traveller. Ski resorts and accommodations that included a Bed and Breakfast, spa or gourmet restaurant also received slightly above-average interest from Youth Market members during the past two years.

Technical Note

This analysis was based on a factor analysis of the accommodation-related activities sought during the past two years. See Appendix Six for a description of the individual items associated with each of these factor scores. The factor scores for each dimension were determined by the weighted sum of all items determined by how much any given item correlated with the overall factor score. Factor scores were standardised with an average of "0" and a standard deviation of "1". A value of "0" means that the travellers in the group exhibited an average tendency to pursue a given vacation activity. Progressively more positive values indicate that the travellers in the group were progressively more likely to have pursued the vacation activity. Progressively more negative values indicate that the travellers within the group were progressively less likely to have pursued the vacation activity.

Youth Market
Day and Overnight Touring Activities in the Last Two Years

Base: Total Population (18-Plus) Who Took an Overnight Trip in Last Two Years:
Canada and United States (Mailback Survey)



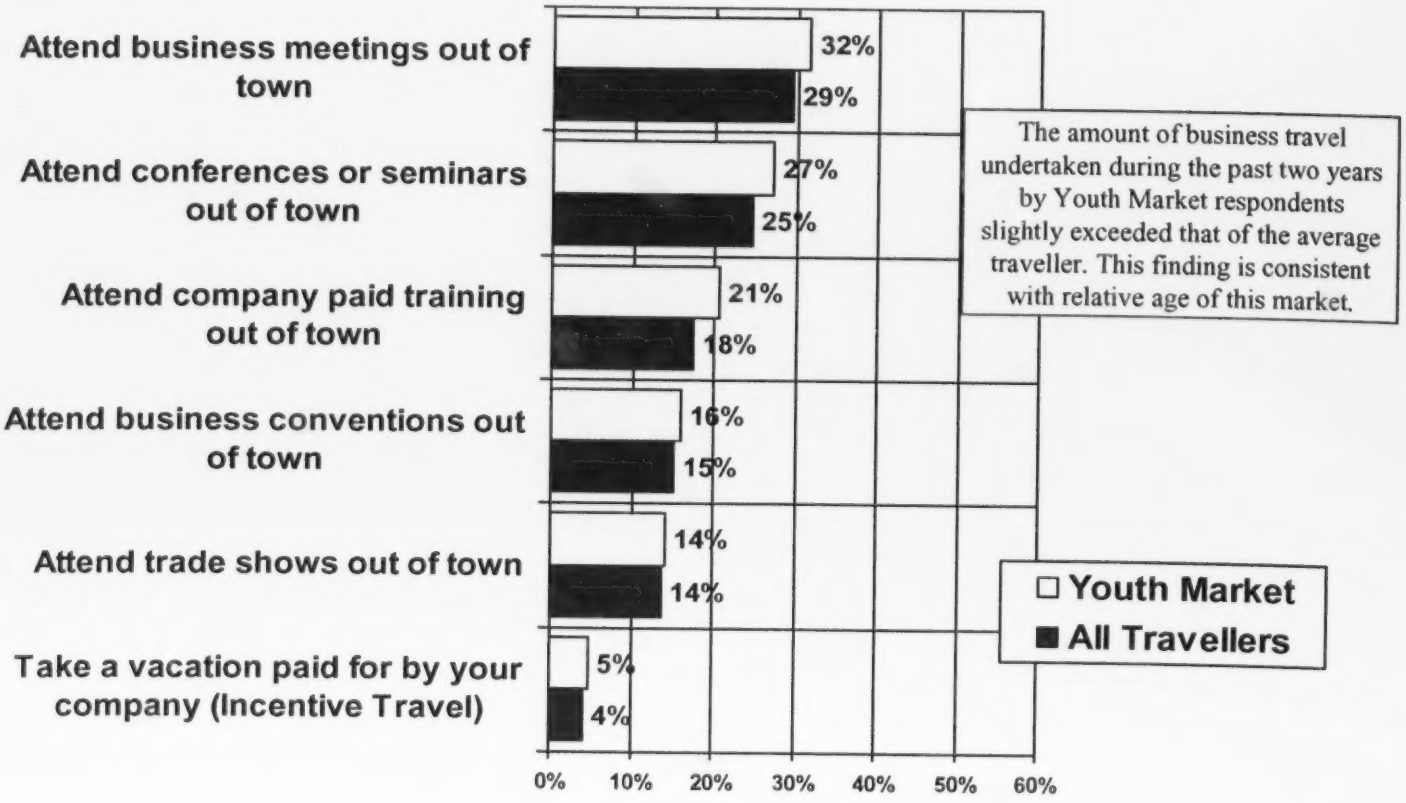
Youth Market participation in most day and overnight touring activities was average to below-average. Respondents were somewhat less likely than the average traveller to have taken guided tours of the city or country.

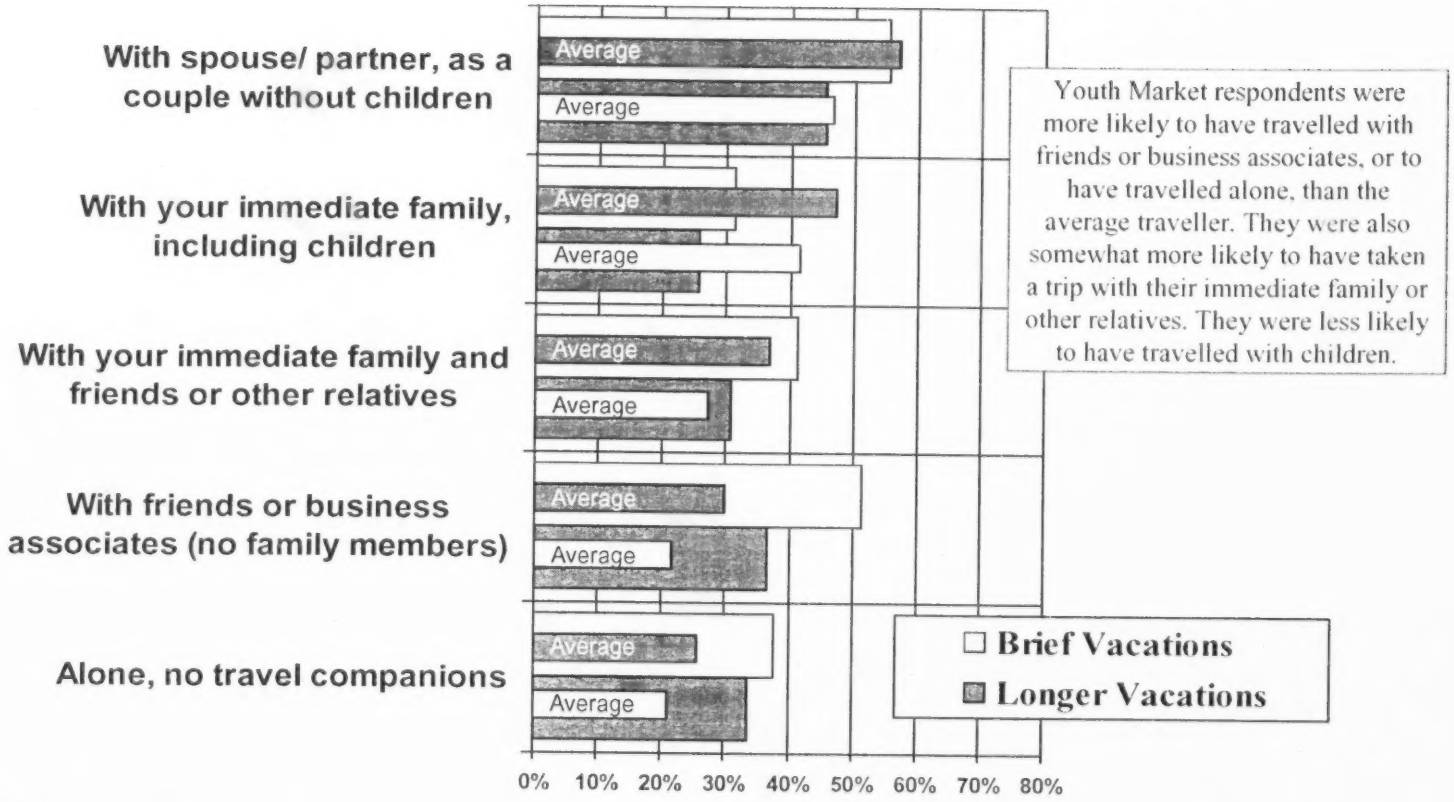
Technical Note

This analysis was based on a factor analysis of the same-day and overnight tours taken during the past two years. See Appendix Seven for a description of the individual items associated with each of these factor scores. The factor scores for each dimension were determined by the weighted sum of all items determined by how much any given item correlated with the overall factor score. Factor scores were standardised with an average of "0" and a standard deviation of "1". A value of "0" means that the travellers in the group exhibited an average tendency to pursue a given touring activity. Progressively more positive values indicate that the travellers in the group were progressively more likely to have pursued the touring activity. Progressively more negative values indicate that the travellers within the group were progressively less likely to have pursued the touring activity.

Youth Market
Percent Taking Various Types of Overnight Business Trips In Last Two Years

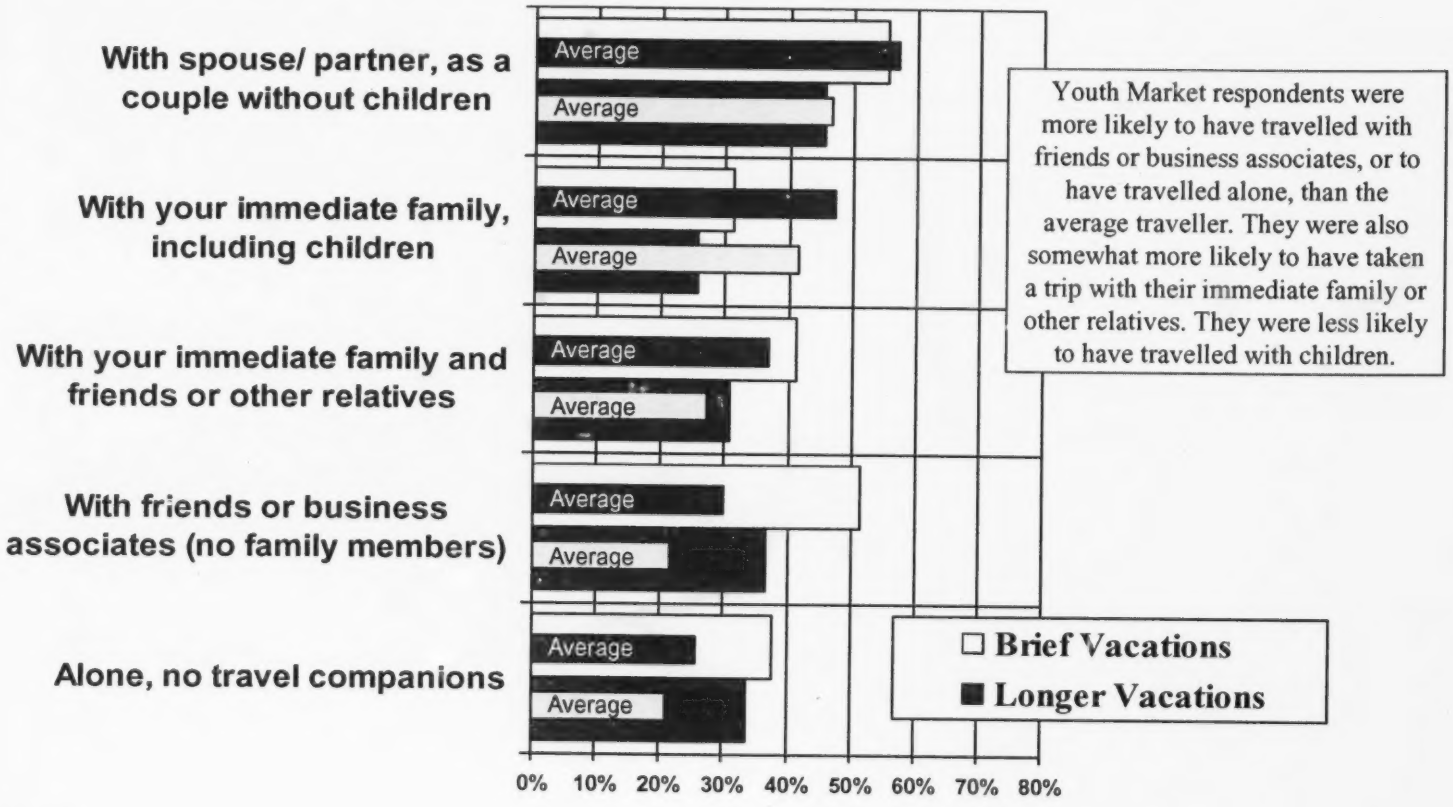
Base: Total Population (18-Plus) Who Took an Overnight Trip in Last Two Years: Canada and United States (Mailback Survey)




With spouse/ partner, as a couple without children
With your immediate family, including children
With your immediate family and friends or other relatives
With friends or business associates (no family members)
Alone, no travel companions
Average
Youth Market respondents were more likely to have travelled with friends or business associates, or to have travelled alone, than the average traveller. They were also somewhat more likely to have taken a trip with their immediate family or other relatives. They were less likely to have travelled with children.
Brief Vacations
Longer Vacations
0%
10%
20%
30%
40%
50%
60%
70%
80%

Youth Market
Composition of Travel Party for Brief and Longer Trips In Last Two Years

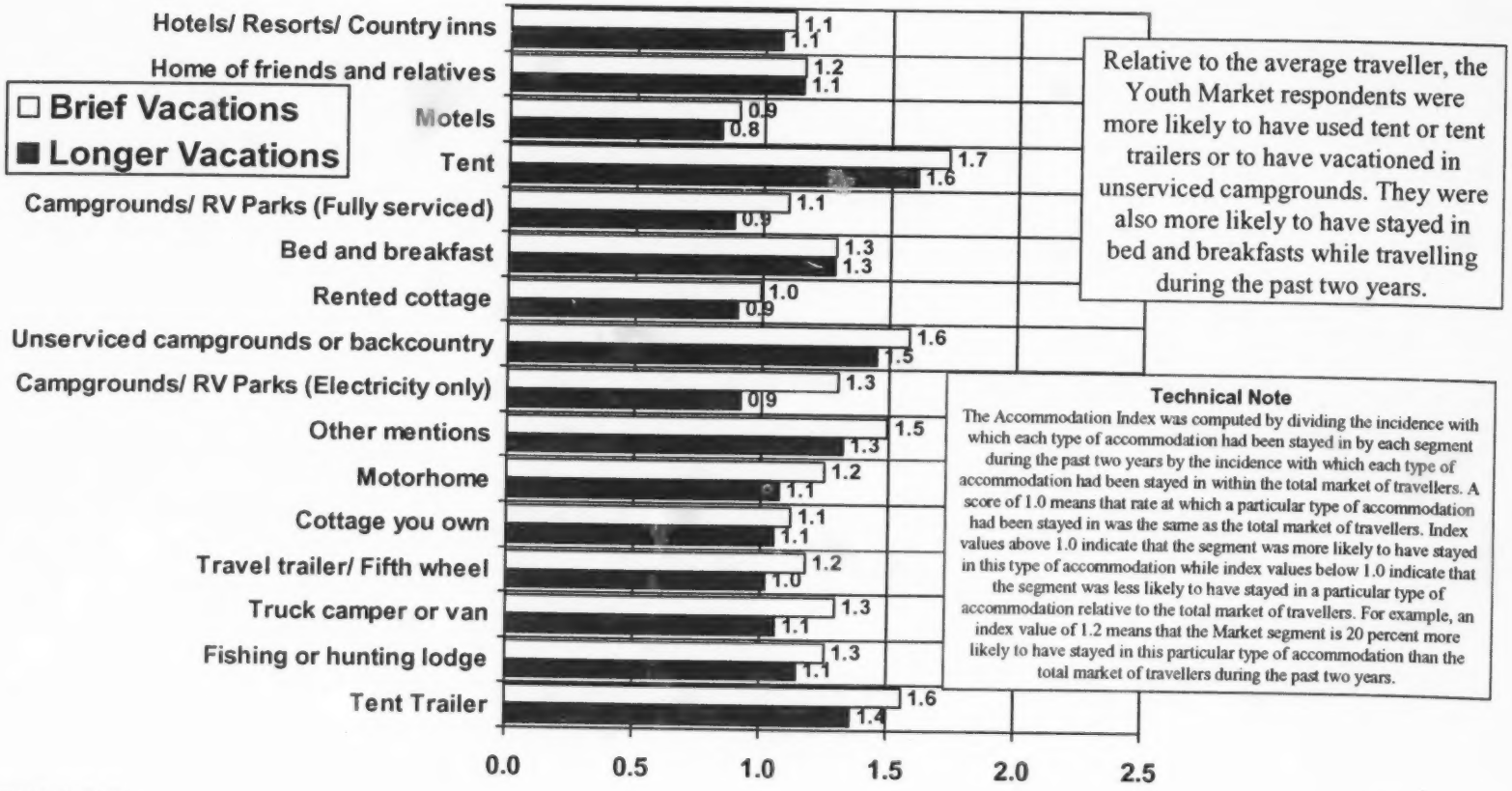
Base: Total Population (18-Plus) Who Took an Overnight Trip in Last Two Years: Canada and United States (Mailback Survey)



Youth Market

Types of Accommodations Used for Brief and Longer Trips In Last Two Years (Indexed)

Base: Total Population (18-Plus) Who Took an Overnight Trip in Last Two Years: Canada and United States (Mailback Survey)



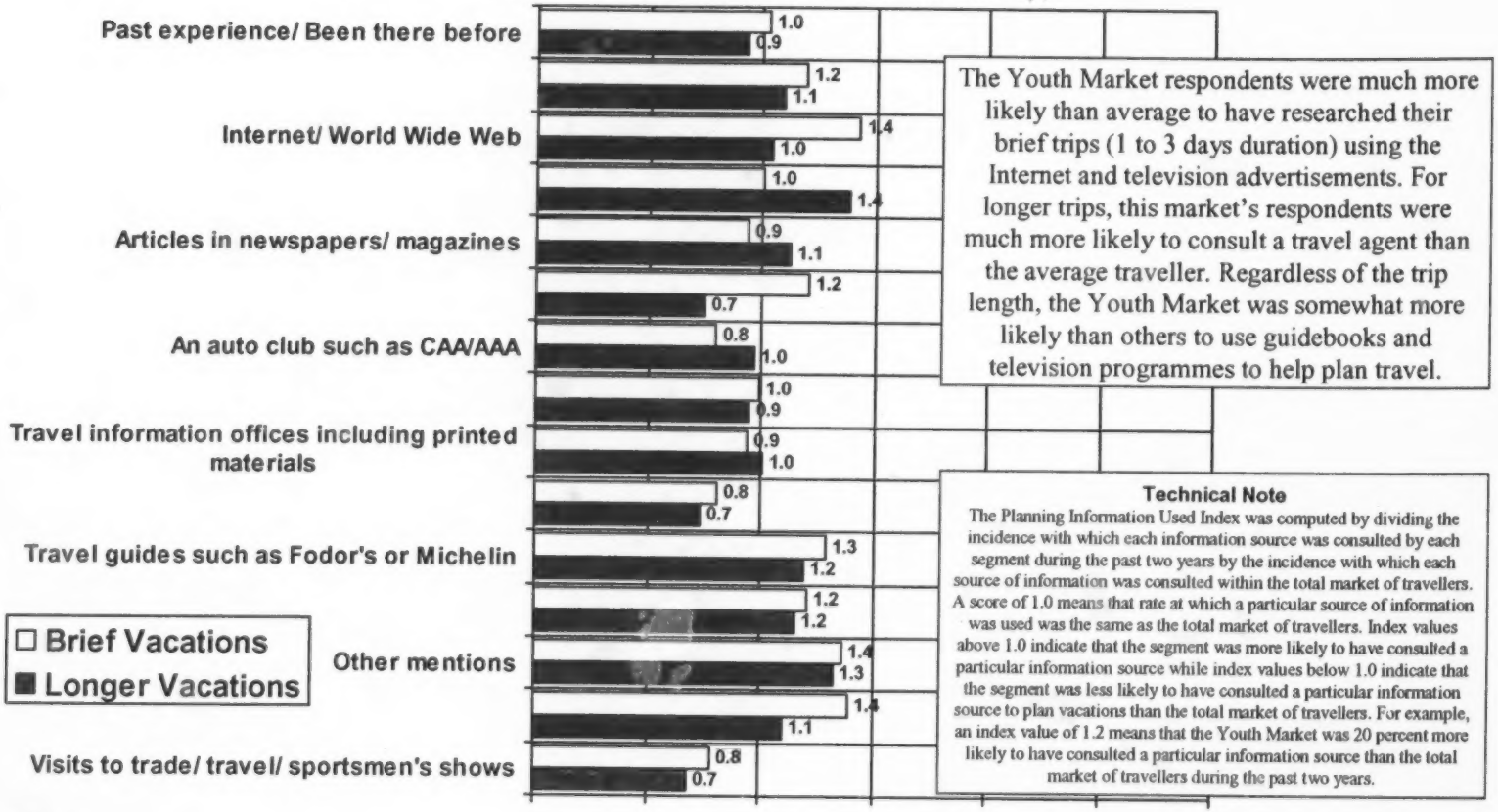
Relative to the average traveller, the Youth Market respondents were more likely to have used tent or tent trailers or to have vacationed in unserviced campgrounds. They were also more likely to have stayed in bed and breakfasts while travelling during the past two years.

Technical Note

The Accommodation Index was computed by dividing the incidence with which each type of accommodation had been stayed in by each segment during the past two years by the incidence with which each type of accommodation had been stayed in within the total market of travellers. A score of 1.0 means that rate at which a particular type of accommodation had been stayed in was the same as the total market of travellers. Index values above 1.0 indicate that the segment was more likely to have stayed in this type of accommodation while index values below 1.0 indicate that the segment was less likely to have stayed in a particular type of accommodation relative to the total market of travellers. For example, an index value of 1.2 means that the Market segment is 20 percent more likely to have stayed in this particular type of accommodation than the total market of travellers during the past two years.

Youth Market
Information Sources Used to Plan Brief and Longer Trips In Last Two Years (Indexed)

Base: Total Population (18-Plus) Who Took an Overnight Trip in Last Two Years: Canada and United States (Mailback Survey)



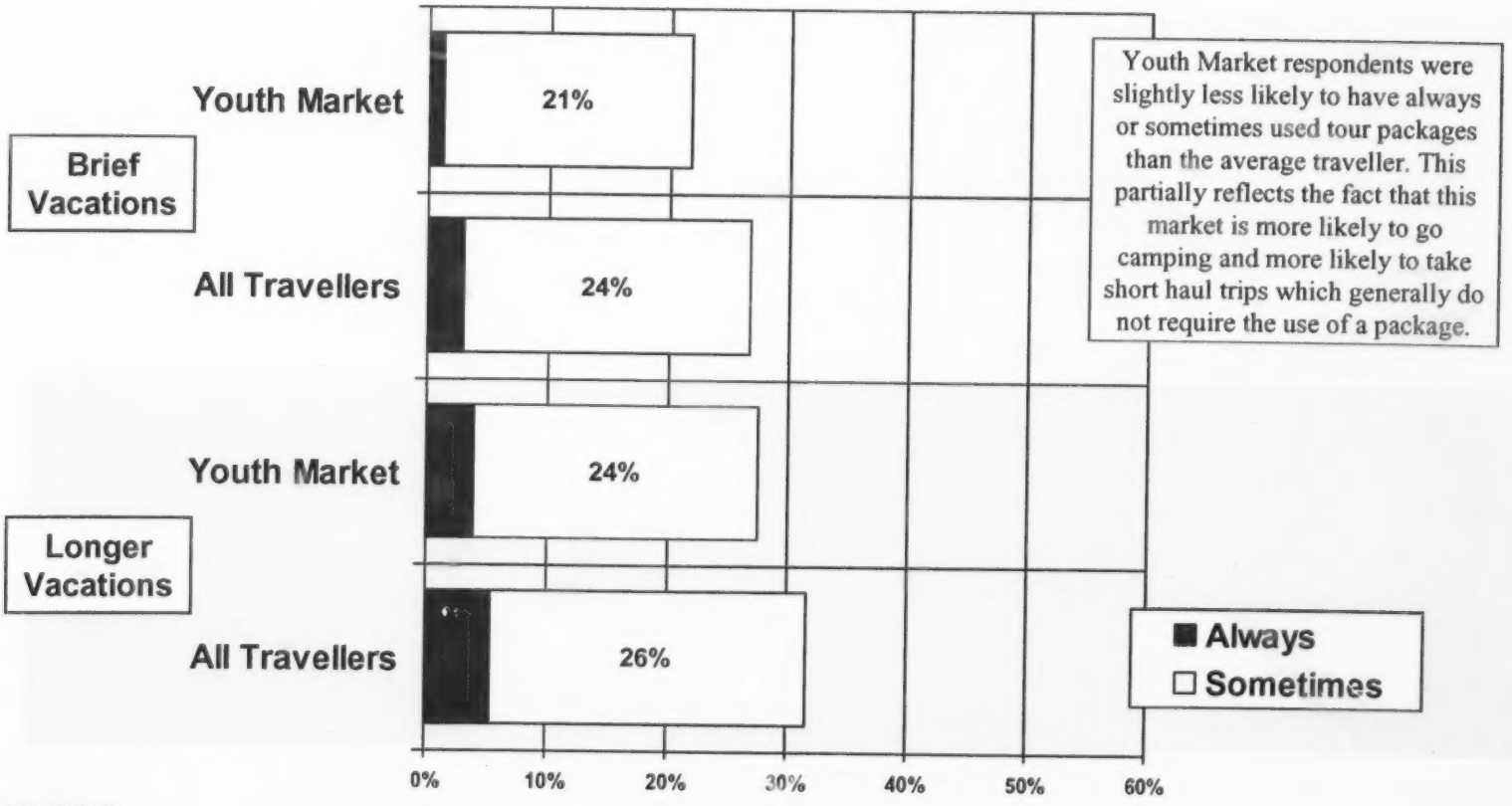
The Youth Market respondents were much more likely than average to have researched their brief trips (1 to 3 days duration) using the Internet and television advertisements. For longer trips, this market's respondents were much more likely to consult a travel agent than the average traveller. Regardless of the trip length, the Youth Market was somewhat more likely than others to use guidebooks and television programmes to help plan travel.

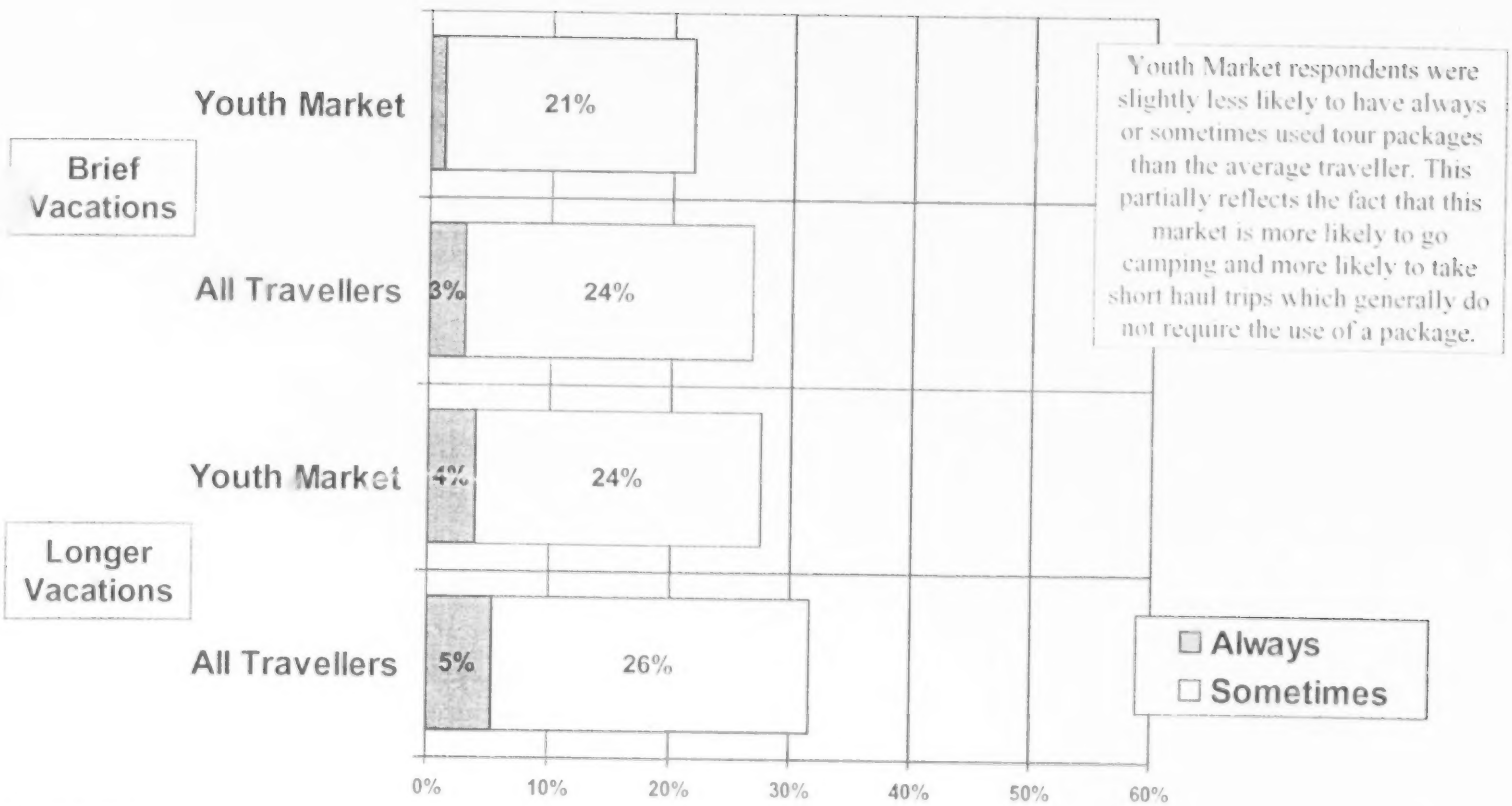
Technical Note

The Planning Information Used Index was computed by dividing the incidence with which each information source was consulted by each segment during the past two years by the incidence with which each source of information was consulted within the total market of travellers. A score of 1.0 means that rate at which a particular source of information was used was the same as the total market of travellers. Index values above 1.0 indicate that the segment was more likely to have consulted a particular information source while index values below 1.0 indicate that the segment was less likely to have consulted a particular information source to plan vacations than the total market of travellers. For example, an index value of 1.2 means that the Youth Market was 20 percent more likely to have consulted a particular information source than the total market of travellers during the past two years.

Youth Market
How Often Travel Packages Used for Brief And Longer Trips in Last Two Years

Base: Total Population (18-Plus) Who Took an Overnight Trip in Last Two Years: Canada and United States (Mailback Survey)

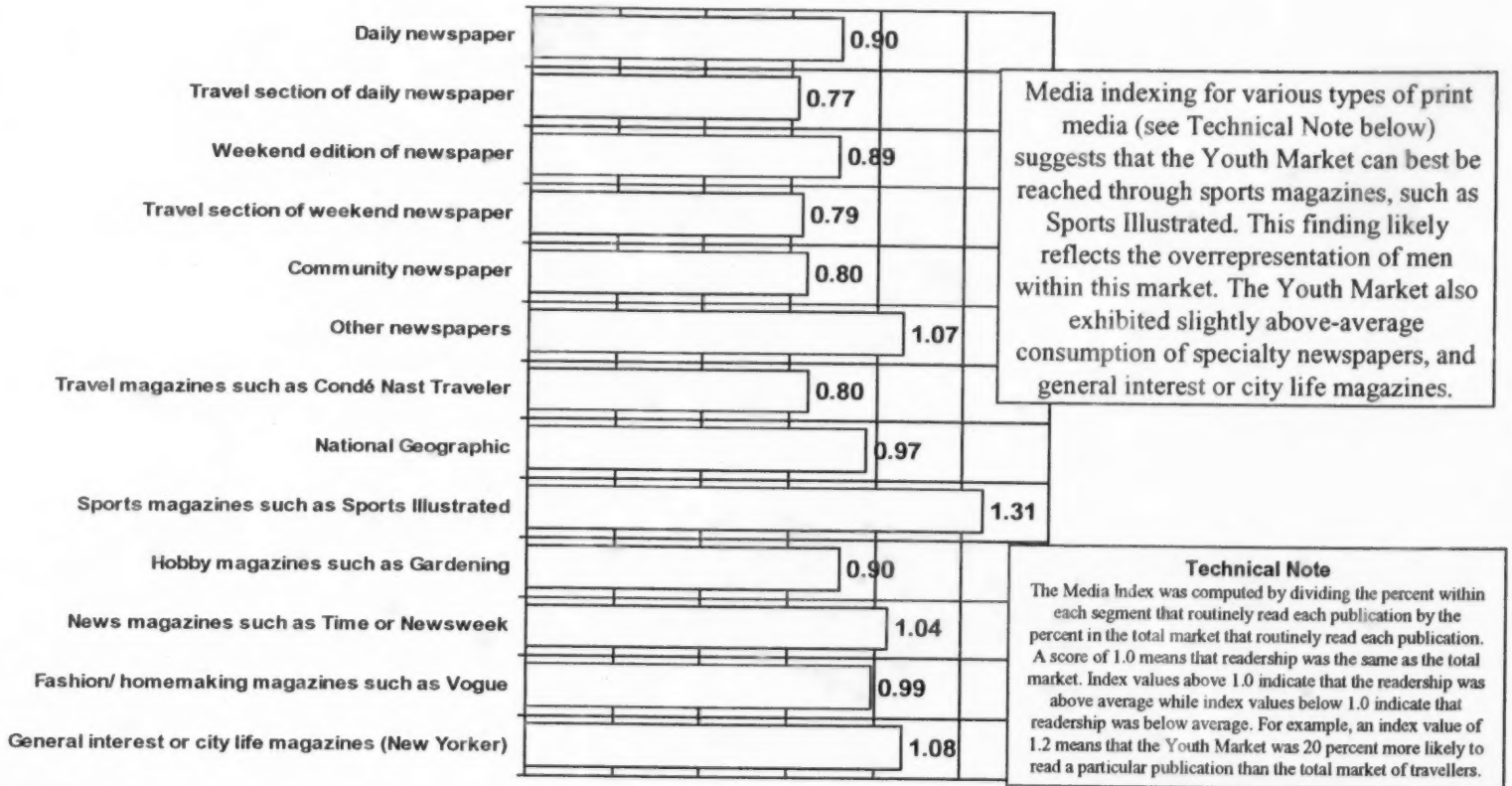



Youth Market
Brief Vacations
All Travellers
Youth Market
Longer Vacations
All Travellers
21%
3%
24%
4%
24%
5%
26%
0%
10%
20%
30%
40%
50%
60%
Always
Sometimes
Youth Market respondents were slightly less likely to have always or sometimes used tour packages than the average traveller. This partially reflects the fact that this market is more likely to go camping and more likely to take short haul trips which generally do not require the use of a package.

Youth Market Media Index for Print Media: Canada and U.S.

Percent Reading Each Publication Type in Segment By Percent Reading Each Publication Type Among Travellers

Base: Total Population (18-Plus) Who Took an Overnight Trip in Last Two Years: Canada and United States (Mailback Survey)



Media indexing for various types of print media (see Technical Note below) suggests that the Youth Market can best be reached through sports magazines, such as Sports Illustrated. This finding likely reflects the overrepresentation of men within this market. The Youth Market also exhibited slightly above-average consumption of specialty newspapers, and general interest or city life magazines.

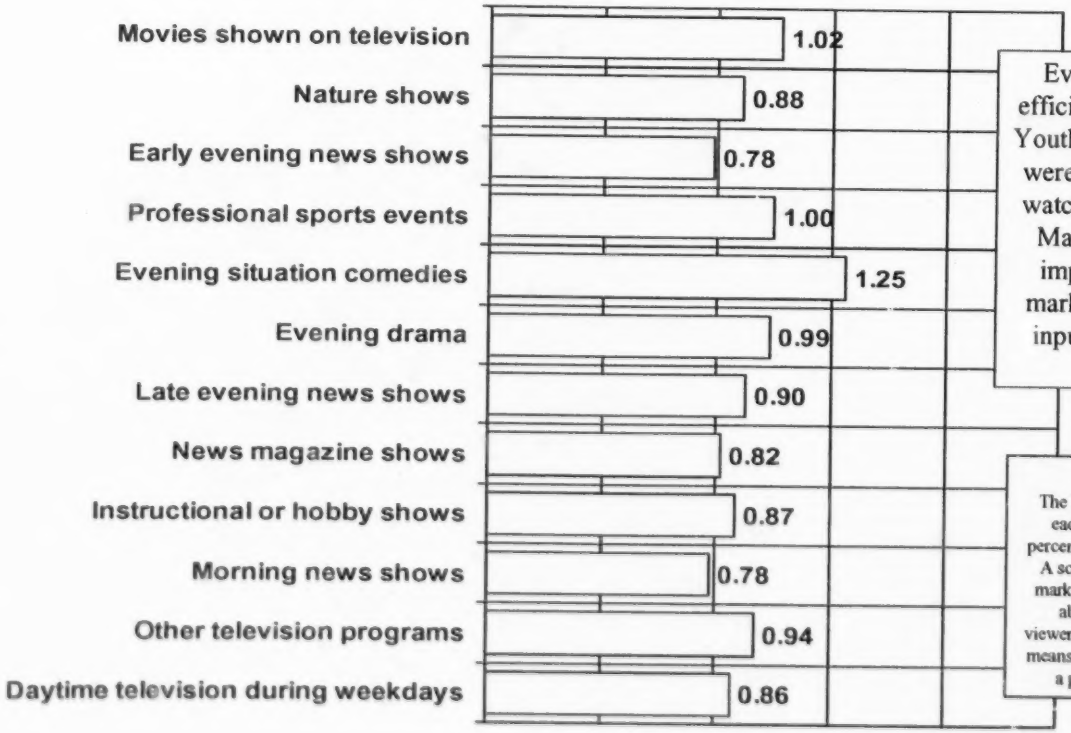
Technical Note

The Media Index was computed by dividing the percent within each segment that routinely read each publication by the percent in the total market that routinely read each publication. A score of 1.0 means that readership was the same as the total market. Index values above 1.0 indicate that the readership was above average while index values below 1.0 indicate that readership was below average. For example, an index value of 1.2 means that the Youth Market was 20 percent more likely to read a particular publication than the total market of travellers.

Youth Market Media Index for Television: Canada and U.S.

Percent Watching Each Type of Programme in Segment by Percent Watching Each Type of Programme Among Travellers

Base: Total Population (18-Plus) Who Took an Overnight Trip in Last Two Years: Canada and United States (Mailback Survey)



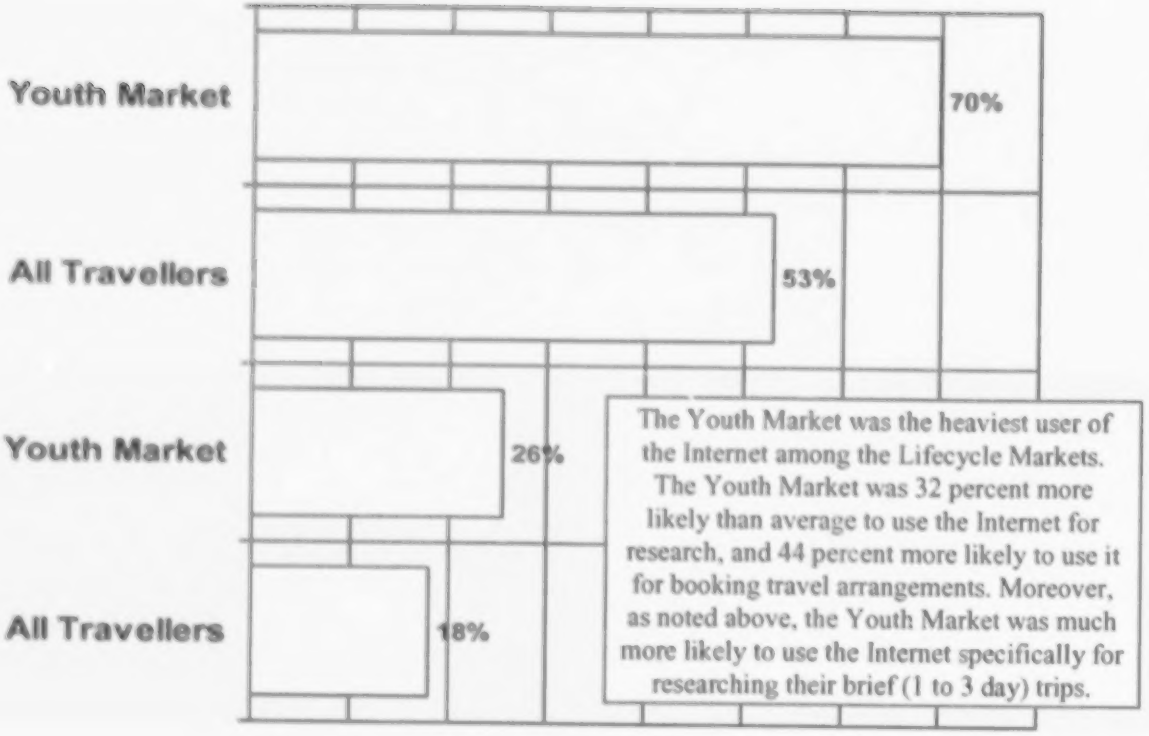
Evening situation comedies are the most efficient programming by which to target the Youth Market. Members of the Youth Market were 25 percent more likely than average to watch this type of programming. The Youth Market's television viewership habits are important for travel promotion since this market was more likely than average to get input for their travel plans from television programmes and advertising.

Technical Note

The Media Index was computed by dividing the percent within each segment that routinely viewed each programme by the percent in the total market that routinely viewed each programme. A score of 1.0 means that viewership was the same as the total market. Index values above 1.0 indicate that the viewership was above average while index values below 1.0 indicate that viewership was below average. For example, an index value of 1.2 means that the Youth Market was 20 percent more likely to watch a particular programme than the total market of travellers.

Youth Market
Percent Using Internet and Booking at Least One Trip Using the Internet

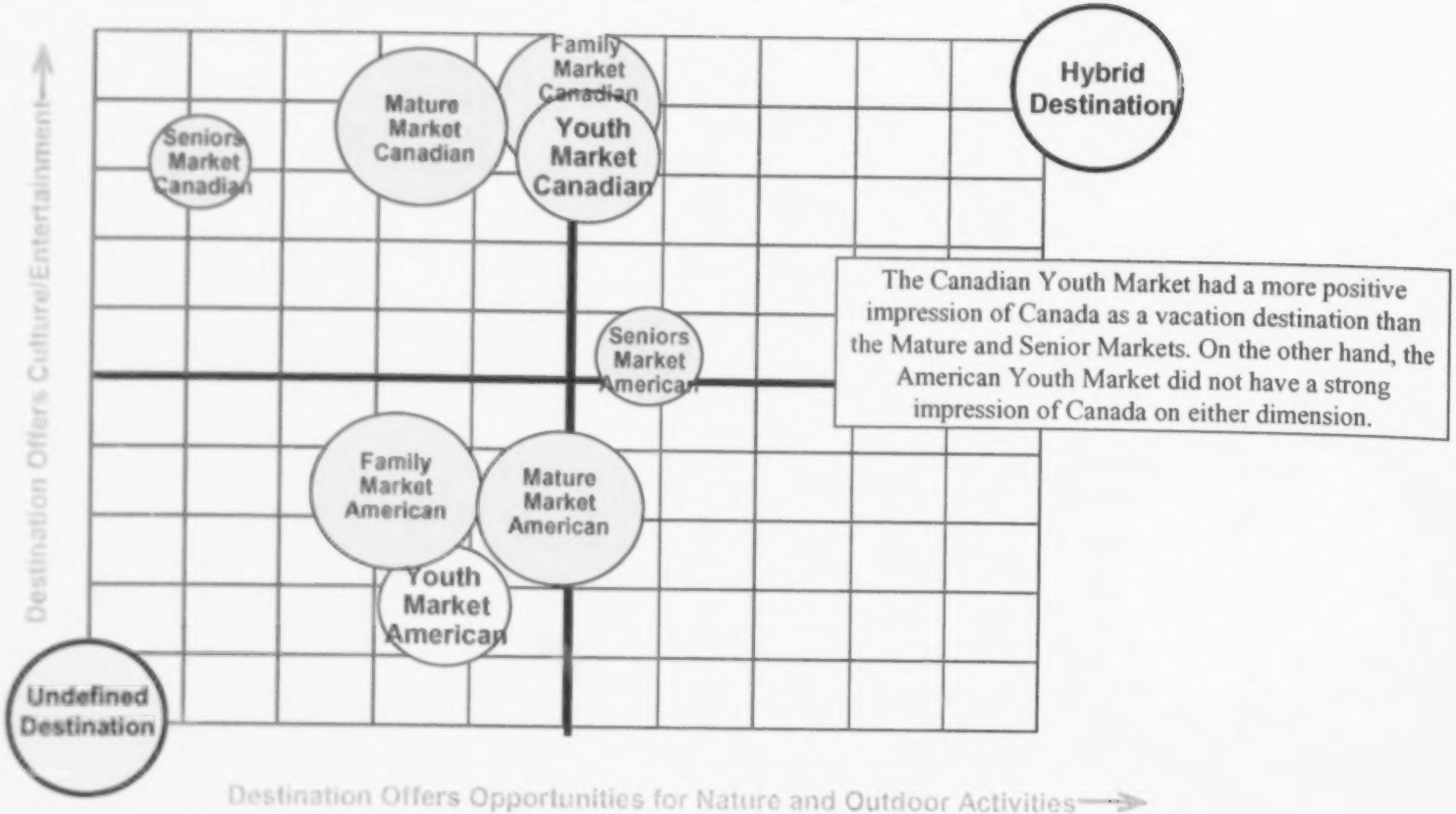
Base: Total Population (18 Plus) Who Took an Overnight Trip in Last Two Years: Canada and United States (Mailback Survey)



Youth Market
Vacation Image of Canada

Base: Total Population (18-Plus) Who Took an Overnight Trip in Last Two Years and Were Able to Rate Canada On One-Plus Attributes: Canada and United States (Mailback Survey)

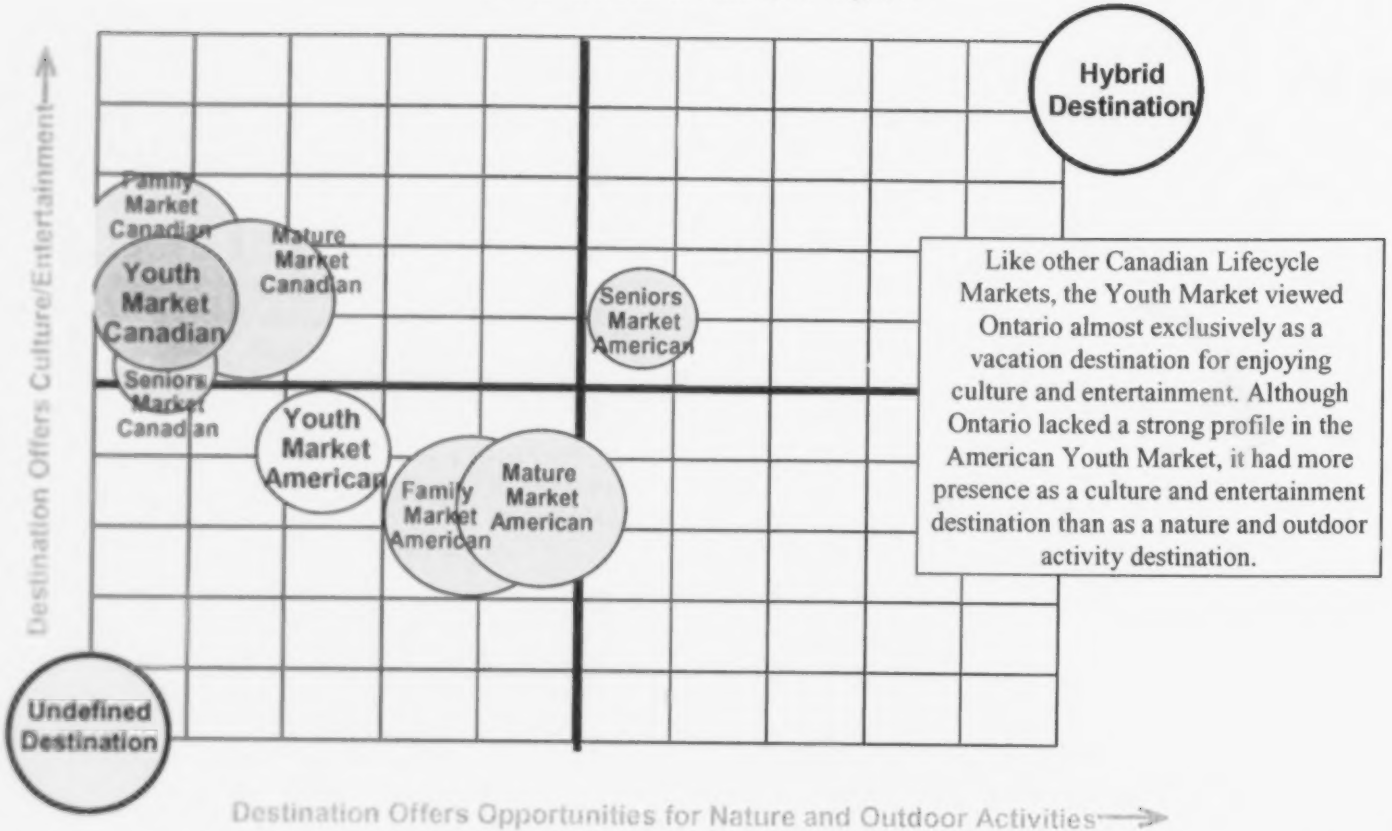
Circle Size Denotes Size of the Segment



Youth Market
Vacation Image of Ontario

Base: Total Population (18-Plus) Who Took an Overnight Trip in Last Two Years and Were Able to Rate Canada On One-Plus Attributes: Canada and United States (Mailback Survey)

Circle Size Denotes Size of the Segment

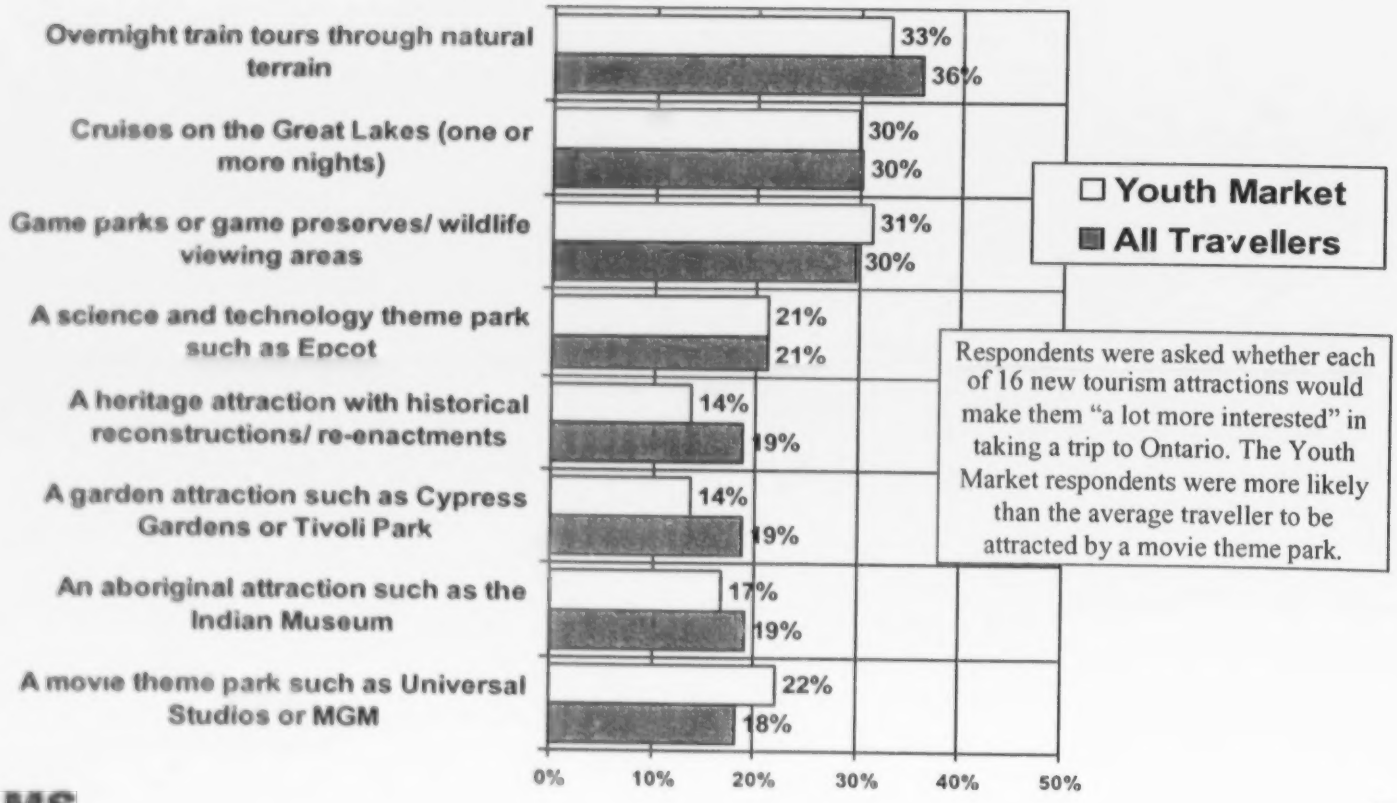


Like other Canadian Lifecycle Markets, the Youth Market viewed Ontario almost exclusively as a vacation destination for enjoying culture and entertainment. Although Ontario lacked a strong profile in the American Youth Market, it had more presence as a culture and entertainment destination than as a nature and outdoor activity destination.

Youth Market Interest in New Tourism Products (Part One of Two)

Percent Stating Attraction Would Make Them "A Lot More Interested" in Taking a Trip to Ontario

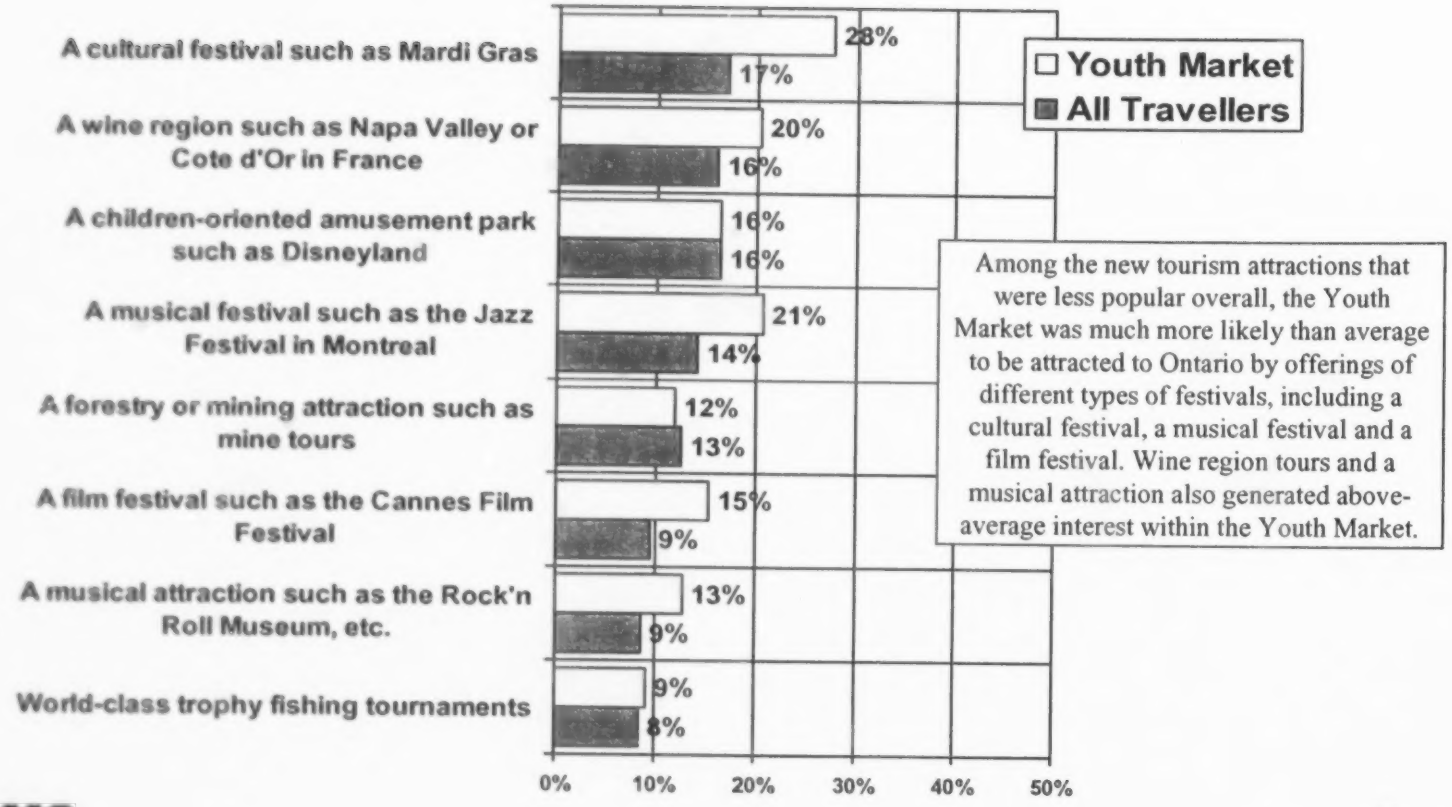
Base: Total Population (18-Plus) Who Took a Trip in Last Two Years: Canada and United States (Mailback Survey)



Youth Market Interest in New Tourism Products (Part Two of Two)

Percent Stating Attraction Would Make Them "A Lot More Interested" in Taking a Trip to Ontario

Base: Total Population (18-Plus) Who Took a Trip in Last Two Years: Canada and United States (Mailback Survey)



Among the new tourism attractions that were less popular overall, the Youth Market was much more likely than average to be attracted to Ontario by offerings of different types of festivals, including a cultural festival, a musical festival and a film festival. Wine region tours and a musical attraction also generated above-average interest within the Youth Market.

Section Four

Family Market

Detailed Lifecycle Market Profile

Family Market

The Family Market represented one-third (33 percent) of the total travel market. This market had an above-average incidence of well-educated, higher income households, and was the most affluent of the four Lifecycle Markets.

Relative to all vacation travellers, the Family Market was slightly less likely to have taken a trip to the United States or to other countries. This reflected the fact that many within this segment tended to travel with children and that travel with children tends to be to shorter-haul destinations. The Canadian Family Market presents an important domestic travel market since this market was more likely than other Canadian markets to express intentions to take a trip in Canada during the next two years. The American Family Market was slightly less likely than the typical American traveller to indicate plans to visit Canada during the next two years.

The Family Market vacation travel revolved around two needs: rest and recuperation, and keeping children entertained. Their preferred outdoor activities were consistent with their desire for recuperative vacation experiences (i.e., sunbathing and swimming, fishing). The priorities of children were reflected in the Family Market's above-average participation in team sports and visits to child-orientated attractions (e.g., zoos, aquariums and planetariums, theme and amusement parks). They were less likely than the average traveller to have taken day and overnight tours during the past two years.

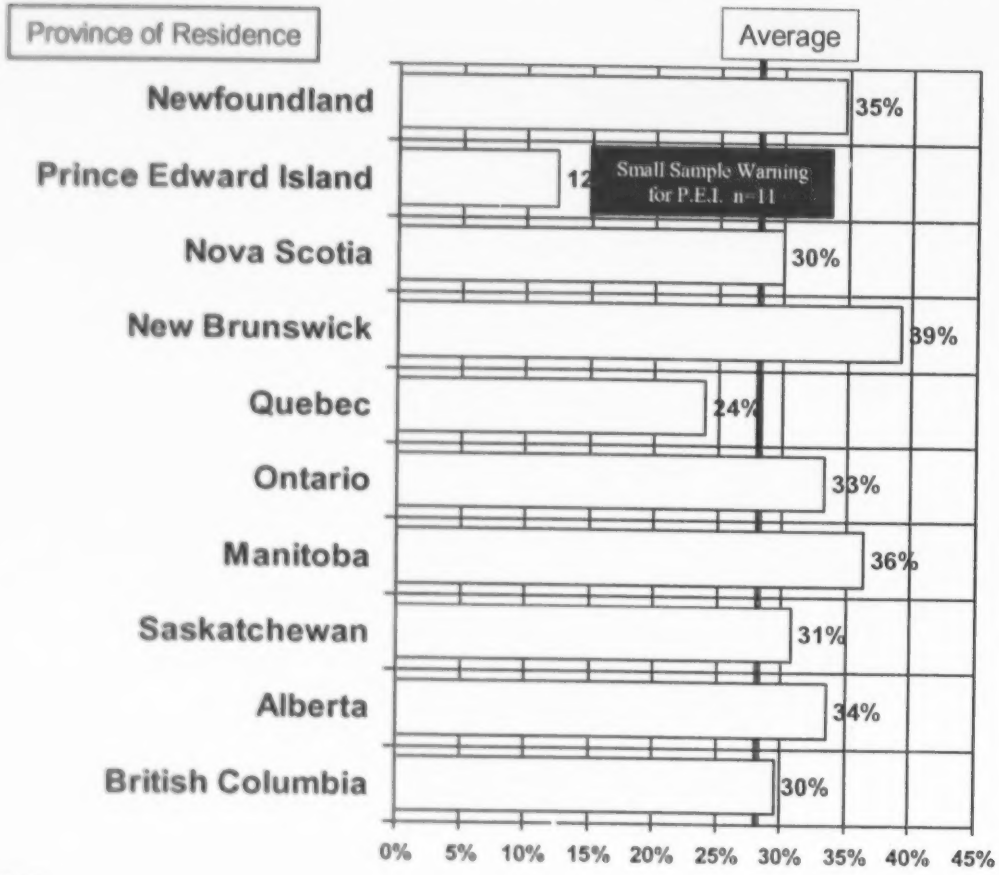
Family Market members were above-average users of the Internet as a source of information for planning brief trips, while travel agents were used more often for longer trips. Although the Family Market exhibited above-average use of the Internet as a research tool, respondents were no more likely than the average traveller to have used the Internet to book travel arrangements.

Targeting travel promotion for the Family Market through the print media was best accomplished through sports magazines and fashion/homemaker magazines. They were also above-average viewers of evening situation comedies, and instructional or hobby shows on television.

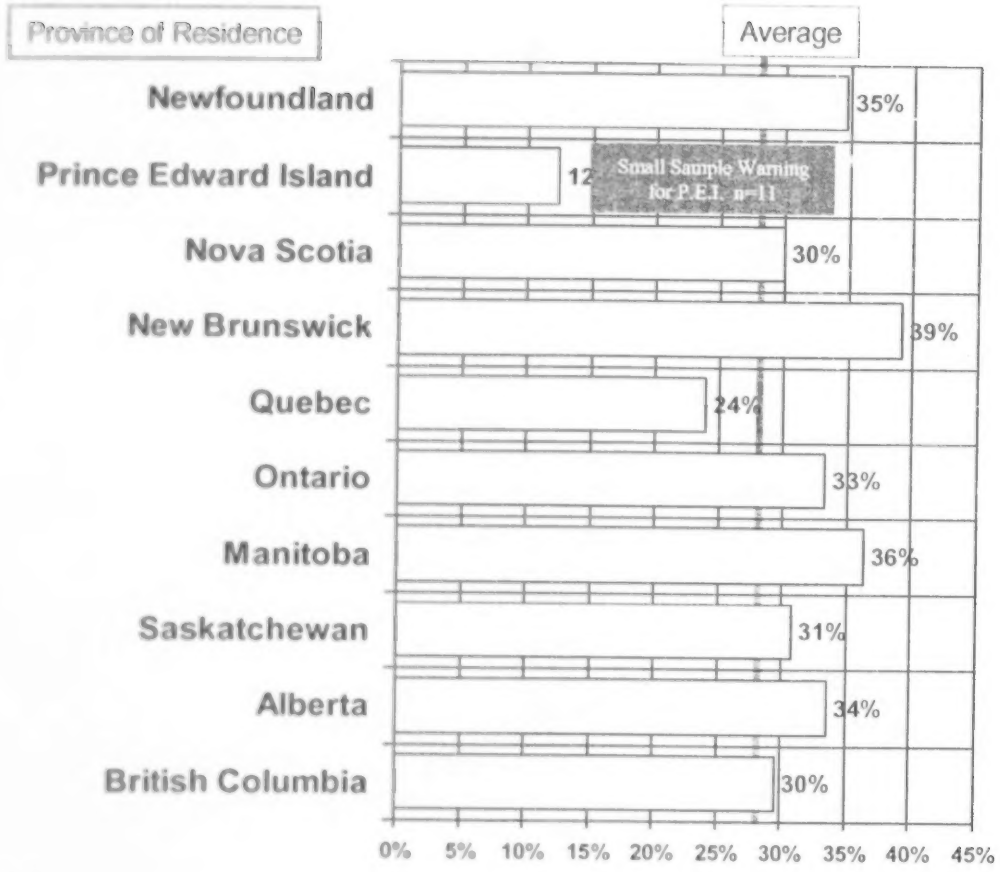
Lifecycle Markets Incidence in Canada

Family Market: By Province

Base: Adult (18-Plus) Canadian Population Who Took a Trip or Plans to Take a Trip in Last/Next Two Years



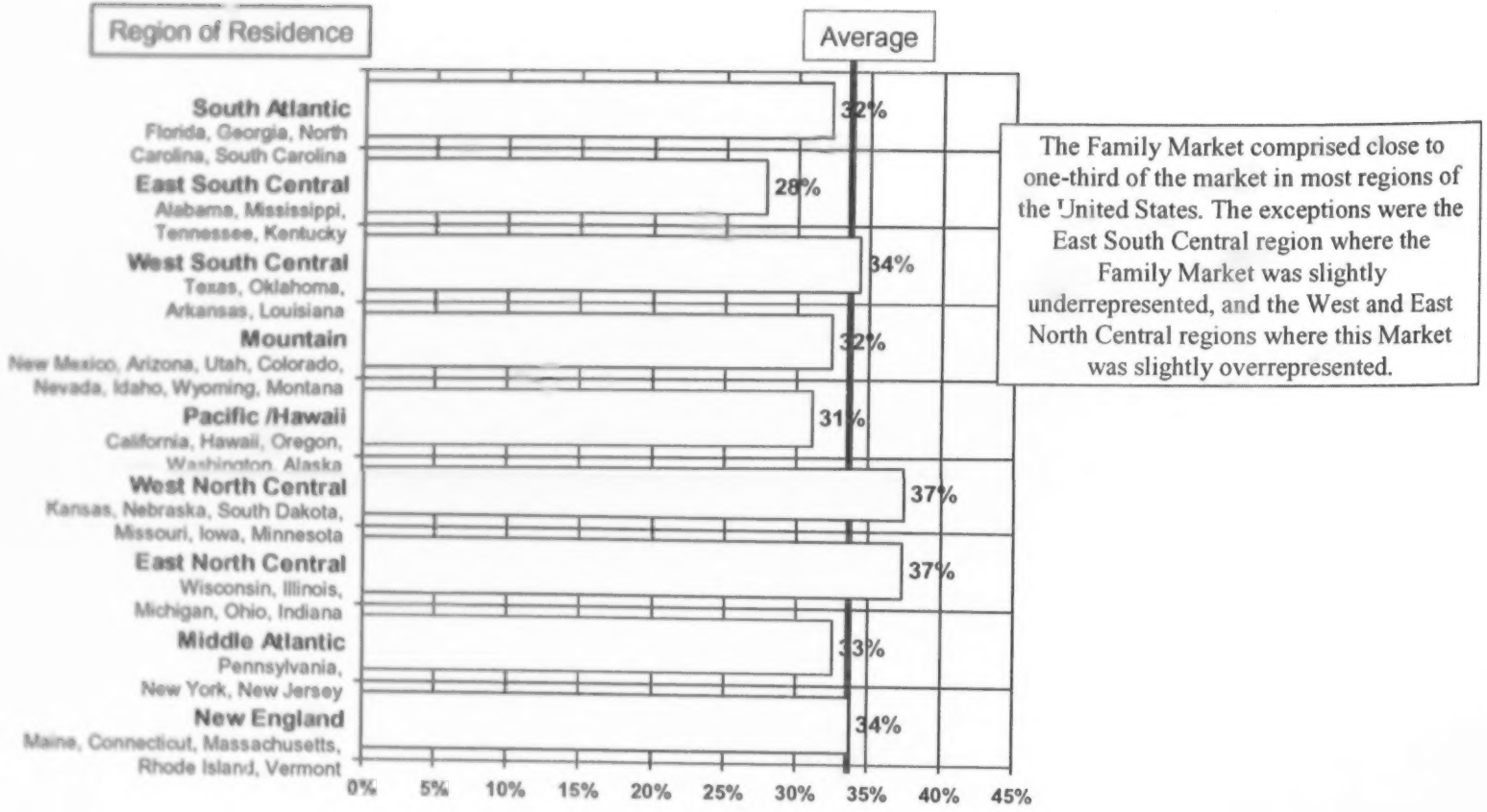
The size of the Family Market varied somewhat from province to province. The Family Market was more commonly found in Newfoundland, New Brunswick, Manitoba and Alberta than elsewhere in the country.



The size of the Family Market varied somewhat from province to province. The Family Market was more commonly found in Newfoundland, New Brunswick, Manitoba and Alberta than elsewhere in the country.

Lifecycle Markets Incidence in United States
Family Market: By U.S. Region

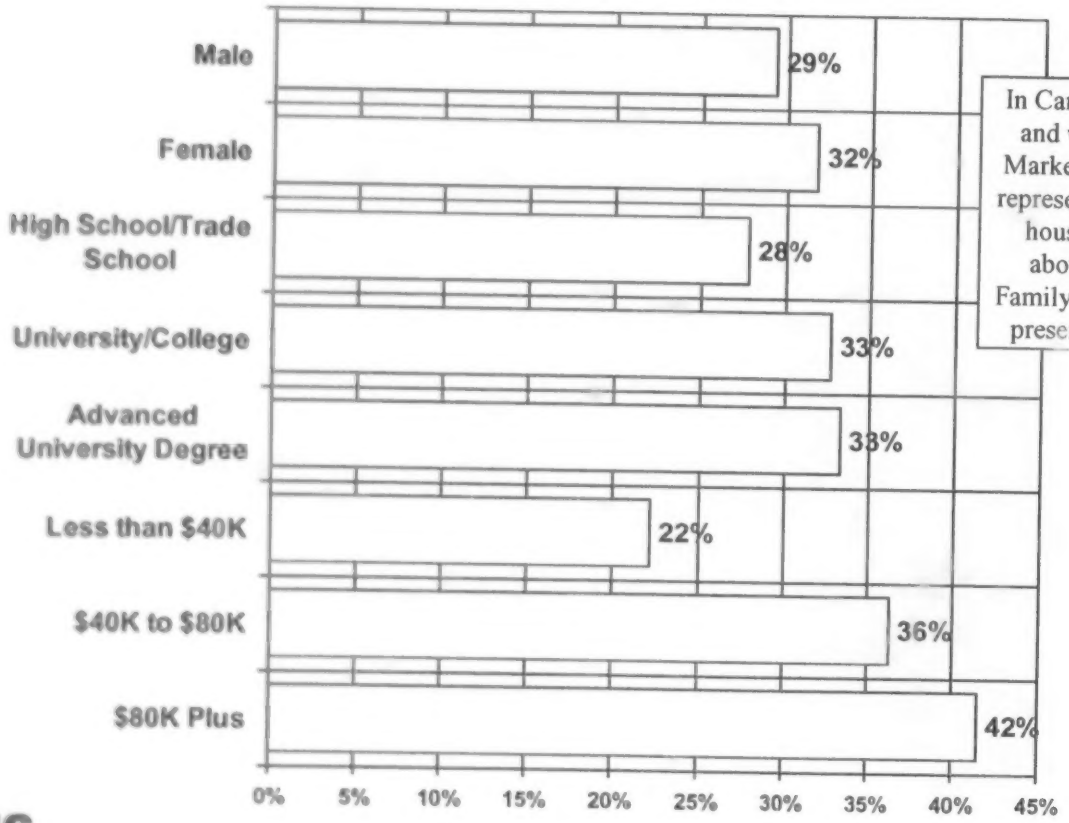
Base: Adult (18-Plus) American Population Who Took a Trip or Plans to Take a Trip in Last/Next Two Years



The Family Market comprised close to one-third of the market in most regions of the United States. The exceptions were the East South Central region where the Family Market was slightly underrepresented, and the West and East North Central regions where this Market was slightly overrepresented.

Lifecycle Markets: Family Market
Canada: By Demographics

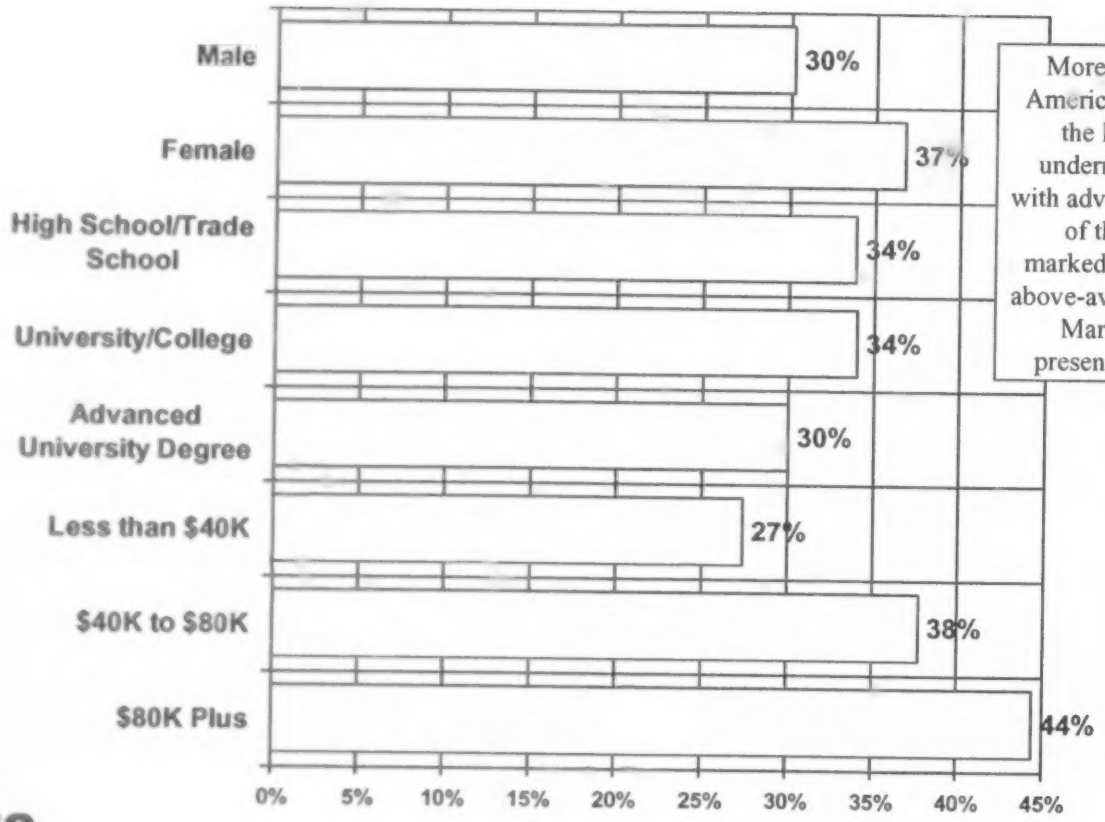
Base: Percent of Population (18-Plus) Who Either Travelled in Last Two Years Or Intends to Travel in Next Two Years



In Canada, similar proportions of men and women belonged to the Family Market. The Family Market was over-represented in the higher education and household income categories. The above-average income within the Family Market may partially reflect the presence of two-income households.

Lifecycle Markets: Family Market
United States: By Demographics

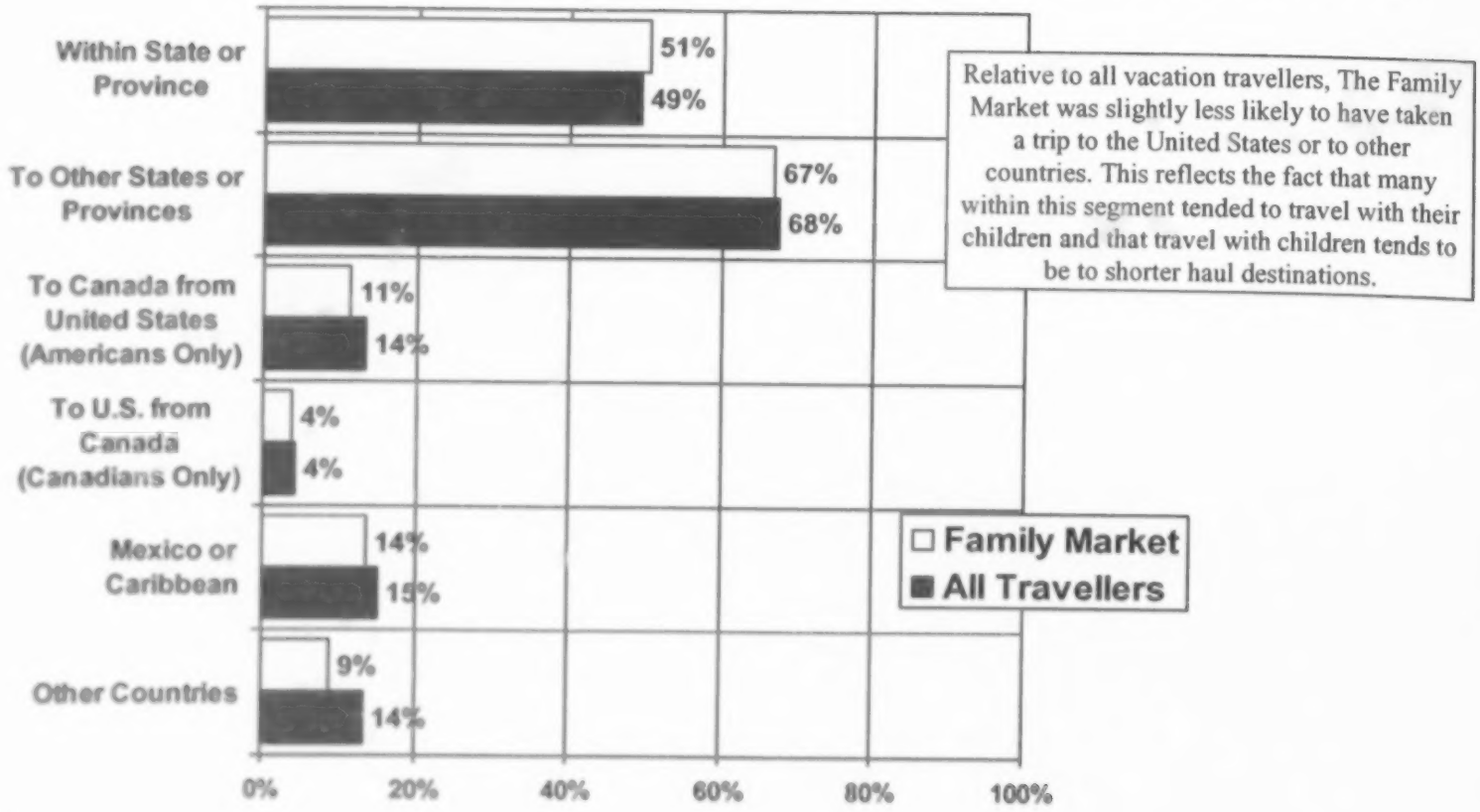
Base: Percent of Population (18-Plus) Who Either Travelled in Last Two Years Or Intends to Travel in Next Two Years



More women than men were in the American Family Market. Members of the Family Market were slightly underrepresented among Americans with advanced degrees, but the incidence of the Family Market increased markedly with household income. The above-average income within the Family Market may partially reflect the presence of two-income households.

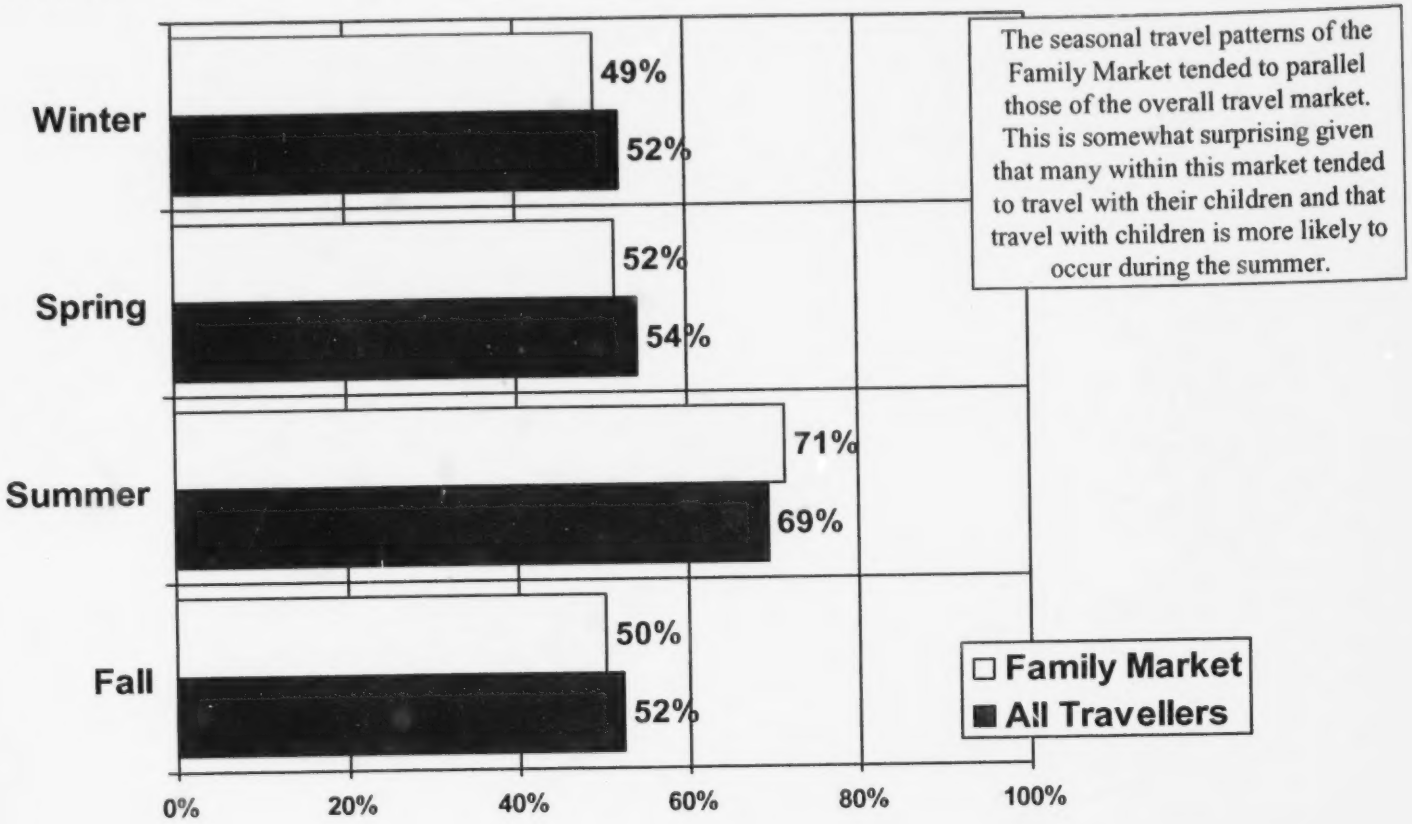
Family Market
Percent Taking Overnight Pleasure Trips To Various Destinations in Last Two Years

Base: Adult (18-Plus) American/Canadian Population Who Took an Overnight Trip in the Last Two Years



Family Market
Percent Taking Overnight Pleasure Trips To Various Destinations By Season in Last Two Years

Base: Adult (18-Plus) American/Canadian Population Who Took an Overnight Trip in Last Two Years

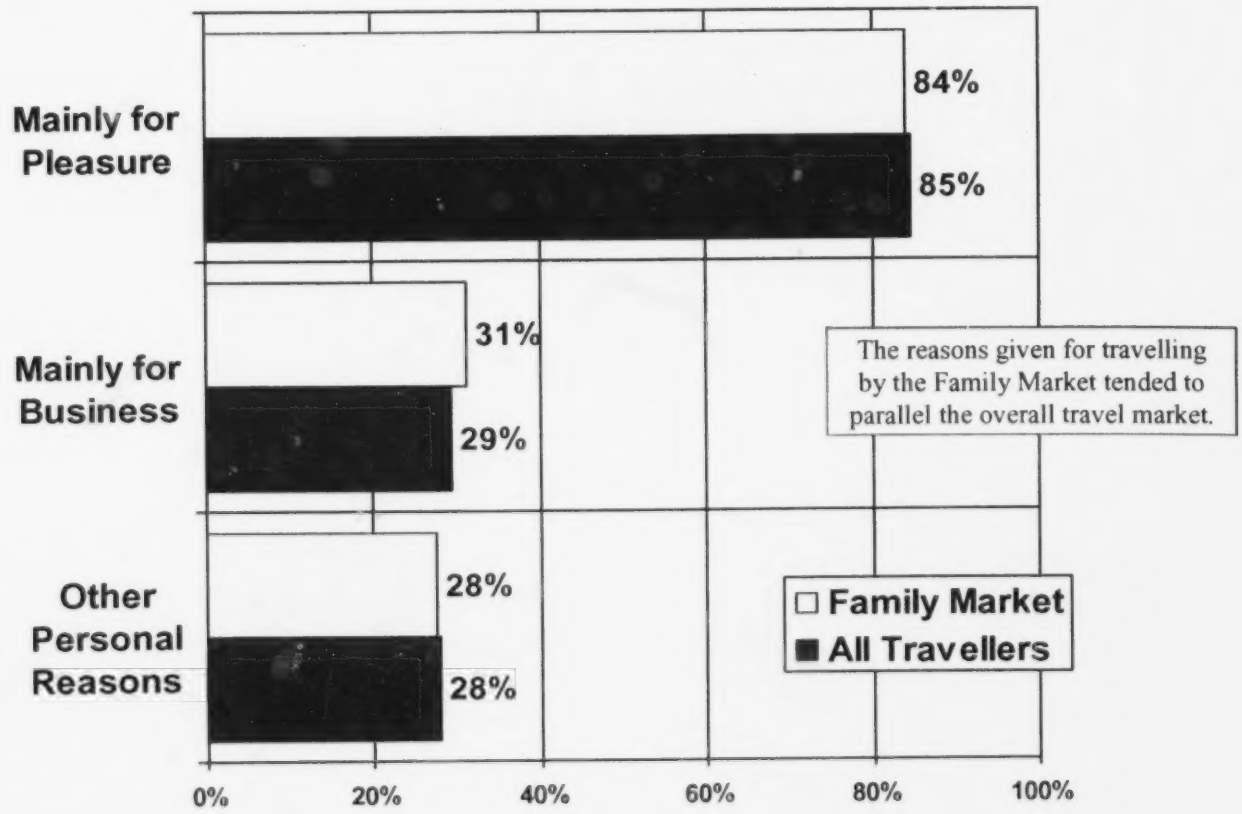


The seasonal travel patterns of the Family Market tended to parallel those of the overall travel market. This is somewhat surprising given that many within this market tended to travel with their children and that travel with children is more likely to occur during the summer.

Family Market

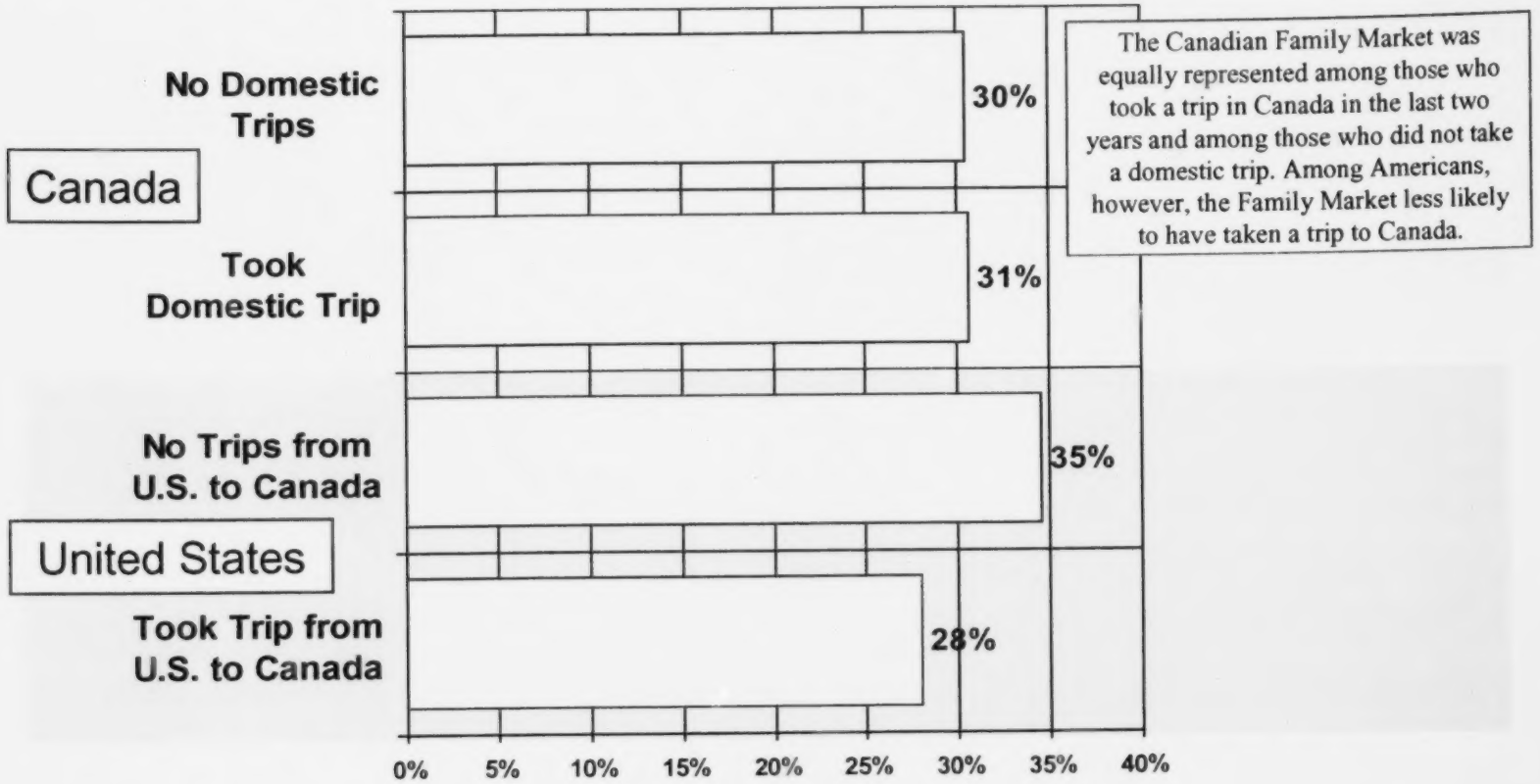
Percent Taking Overnight Pleasure Trip to Various Destinations For Various Reasons in Last Two Years

Base: Adult (18-Plus) American/Canadian Population Who Took an Overnight Trip in Last Two Years



Canada vs. U.S.: By Trips in Canada Last Two Years, Percent Taking at Least One Trip in Canada in Last Two Years

Base: Percent of Population (18-Plus) Who Either Travelled in Last Two Years Or Intends to Travel in Next Two Years

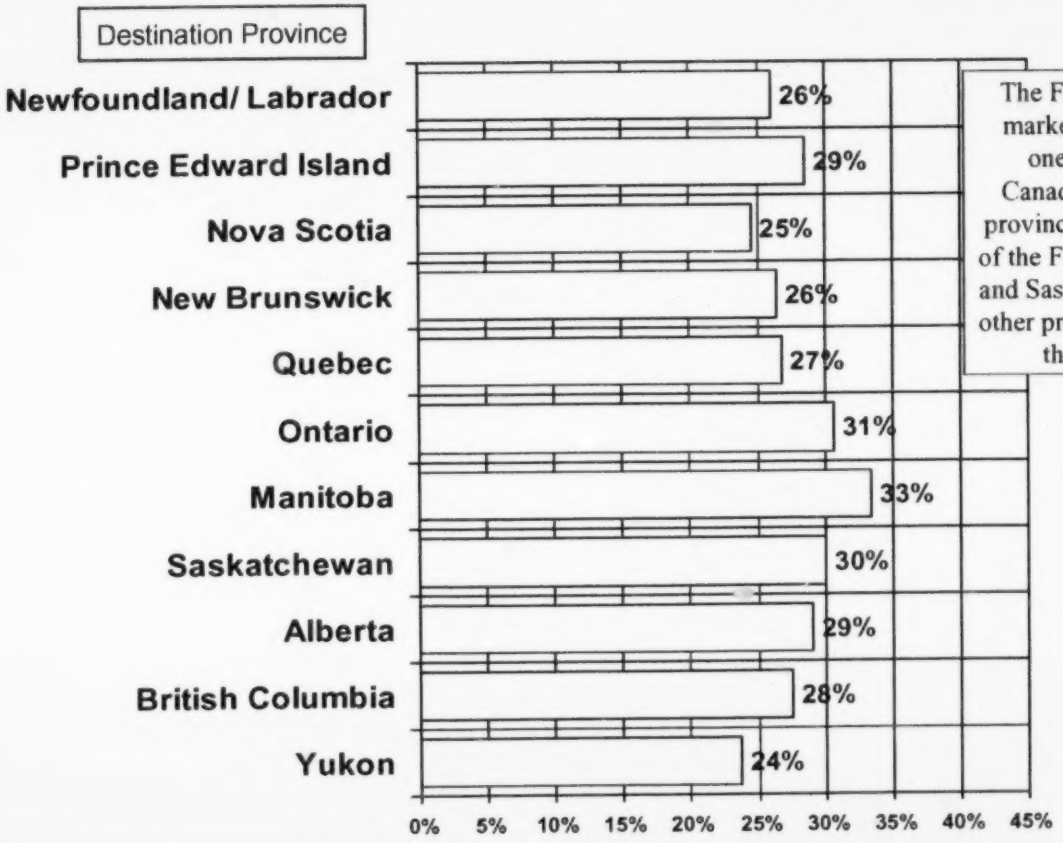


The Canadian Family Market was equally represented among those who took a trip in Canada in the last two years and among those who did not take a domestic trip. Among Americans, however, the Family Market less likely to have taken a trip to Canada.

Family Market

Percent of Canadians Taking an Overnight Pleasure Trip To Various Provinces in Last Two Years

Base: Adult (18-Plus) Canadian Population Who Took an Overnight Trip within Canada in the last two Years

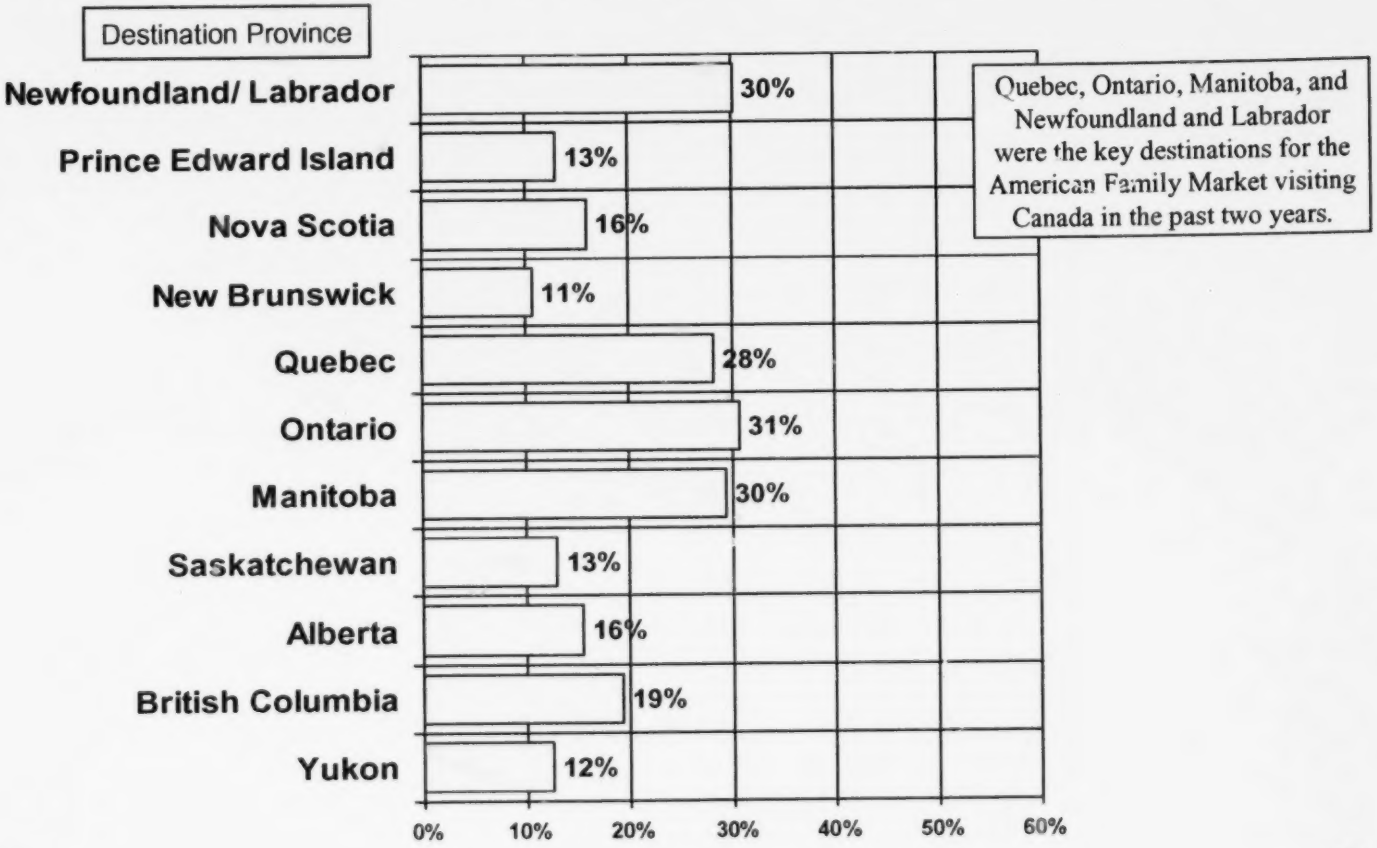


The Family Market is a key lifecycle market for domestic travel. Between one-quarter and one-third of the Canadian travellers who visited each province in the past two years were part of the Family Market. Manitoba, Ontario and Saskatchewan were more likely than other provinces to have had visitors from the Canadian Family Market.

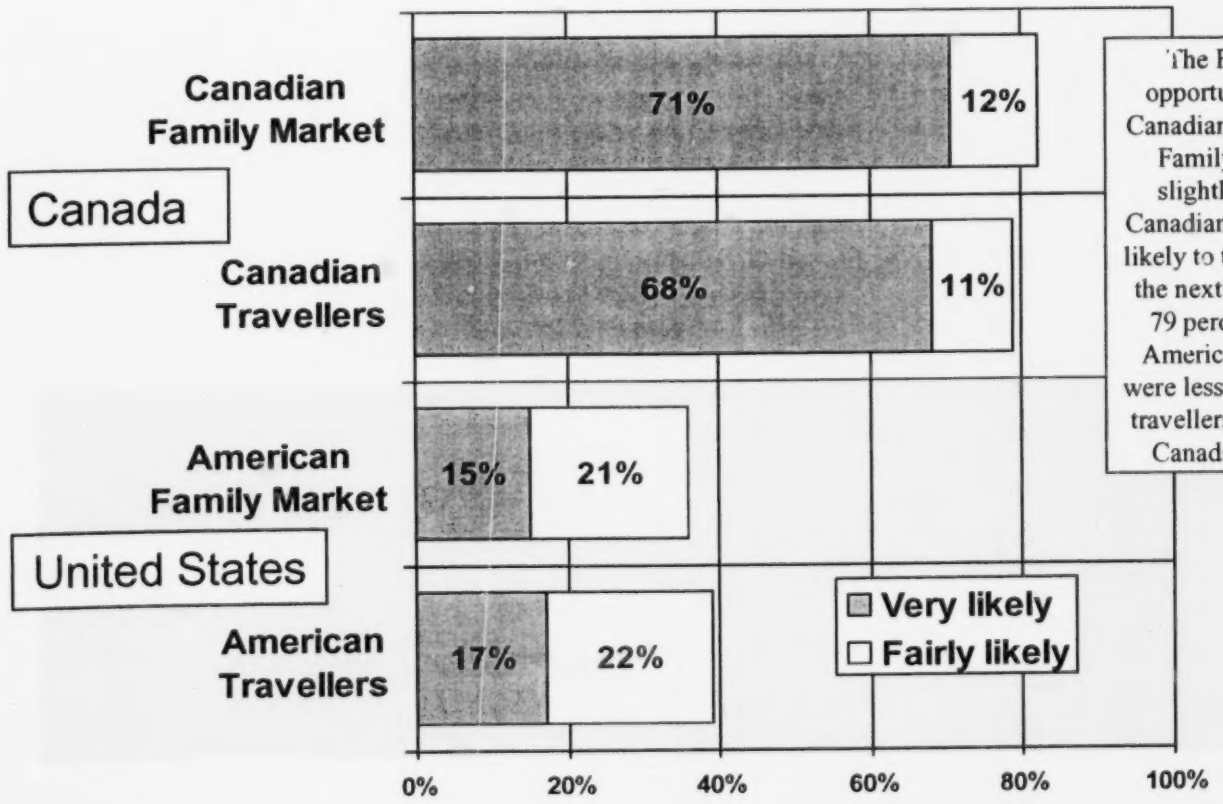
Family Market

Percent of Americans Taking an Overnight Pleasure Trip To Various Provinces in Last Two Years

Base: Adult (18-Plus) American Population Who Took an Overnight Trip to Canada in the Last Two Years



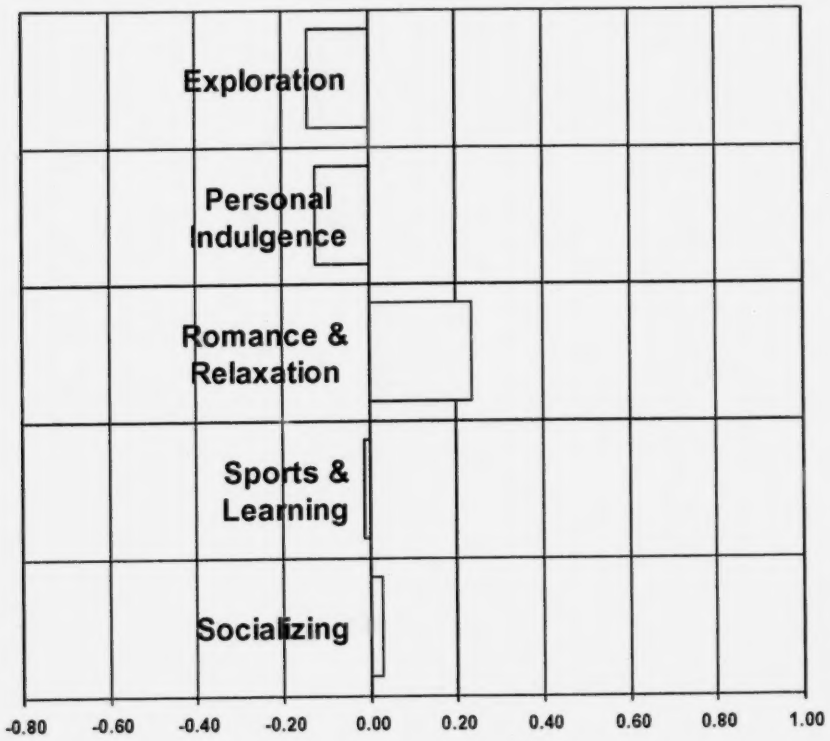
Family Market
Intentions to Travel Within/To Canada Next Two Years
Base: Adult Population (18-Plus) Who Took an Overnight Trip in Last Two Years



The Family Market presents an opportunity for some growth in the Canadian travel market. The Canadian Family Market respondents were slightly more likely than average Canadian travellers to be very or fairly likely to take a trip within Canada over the next two years (83 percent versus 79 percent). Respondents from the American Family Market, however, were less likely than average American travellers to express intentions to visit Canada during the next two years.

Family Market
General Vacation Experiences Sought During Pleasure Travel in the Last Two Years

Base: Total Population (18-Plus) Who Took an Overnight Trip in Last Two Years: Canada and United States (Mailback Survey)



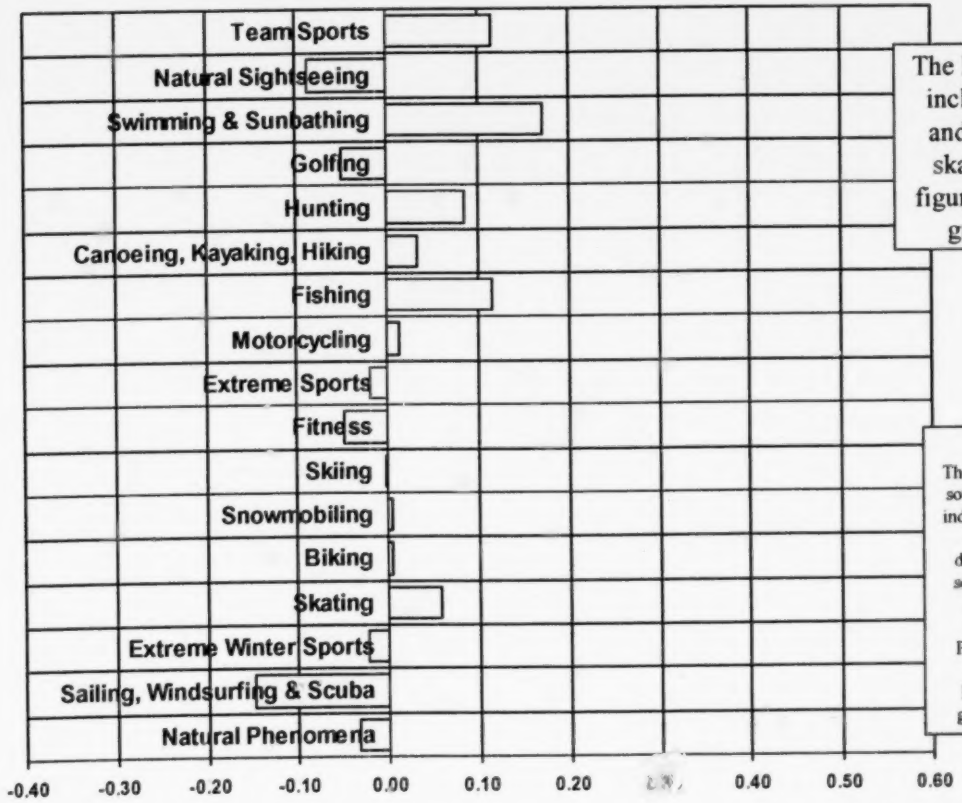
The Family Market was more likely than other travellers to pursue vacation experiences offering opportunities for relaxation and romance. This suggests that the Family Market is more likely to use their vacation time to recuperate and spend quality time with family.

Technical Note

This analysis was based on a factor analysis of the vacation experiences sought during the past two years. See Appendix Three for a description of the individual items associated with each of these factor scores. The factor scores for each dimension were determined by the weighted sum of all items. The weight for each item was determined by how much the item correlated with the overall factor score. Factor scores were standardised with an average of "0" and a standard deviation of "1". A value of "0" means that the travellers in the group exhibited an average tendency to pursue a given vacation experience. Progressively more positive values indicate that the travellers in the group were progressively more likely to have pursued the vacation experience. Progressively more negative values indicate that the travellers within the group were progressively less likely to have pursued the vacation experience.

Family Market
Outdoor Activities Sought
During Pleasure Travel in the Last Two Years

Base: Total Population (18-Plus) Who Took an Overnight Trip in Last Two Years: Canada and United States (Mailback Survey)



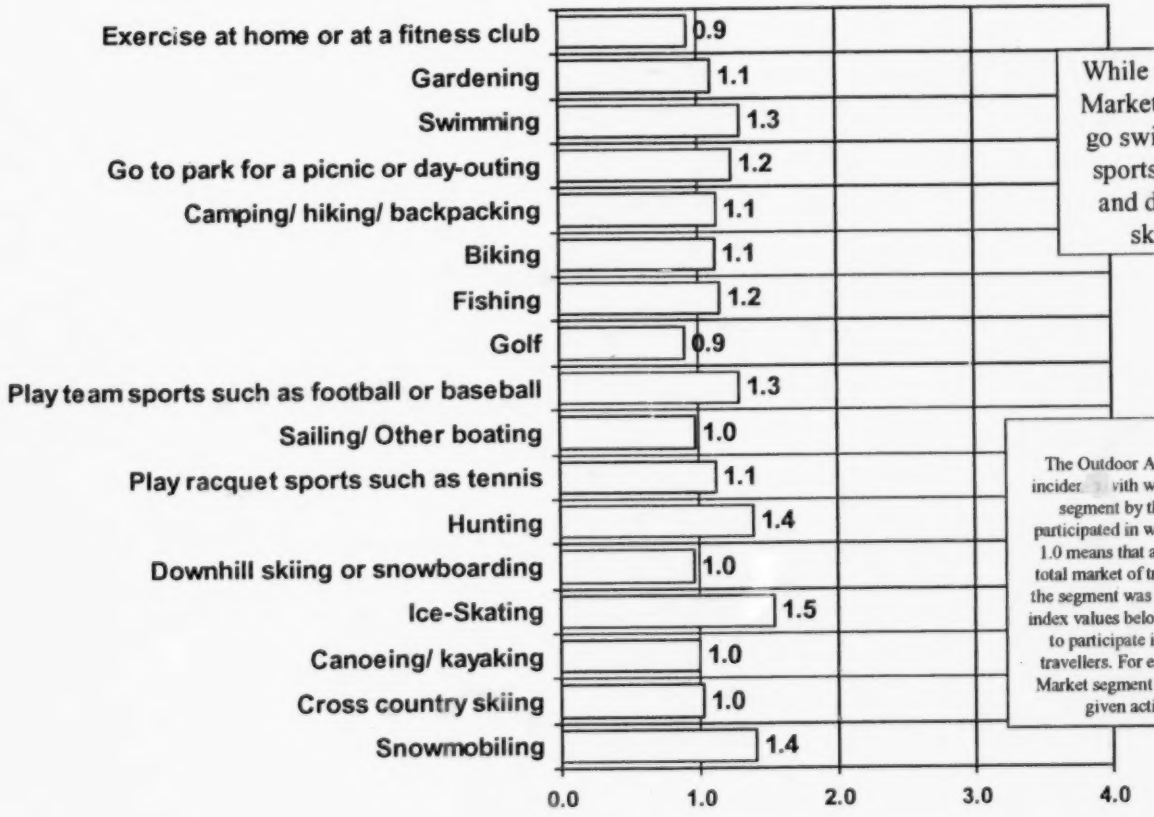
The Family Market was more likely than others to include swimming and sunbathing, team sports, and fishing in respondents' vacations. Hunting, skating, and canoeing, kayaking or hiking also figured into Family Market vacations to a slightly greater extent than for the average traveller.

Technical Note

This analysis was based on a factor analysis of the outdoor vacation activities sought during the past two years. See Appendix Four for a description of the individual items associated with each of these factor scores. The factor scores for each dimension were determined by the weighted sum of all items determined by how much any given item correlated with the overall factor score. Factor scores are standardised with an average of "0" and a standard deviation of "1". A value of "0" means that the travellers in the group exhibited an average tendency to pursue a given vacation activity. Progressively more positive values indicate that the travellers in the group were progressively more likely to have pursued the vacation activity. Progressively more negative values indicate that the travellers within the group were progressively less likely to have pursued the vacation activity.

Family Market
Outdoor Activities Sought While Not Travelling (Indexed)

Base: Total Population (18-Plus) Who Took an Overnight Trip in Last Two Years.
Canada and United States (Mailback Survey)



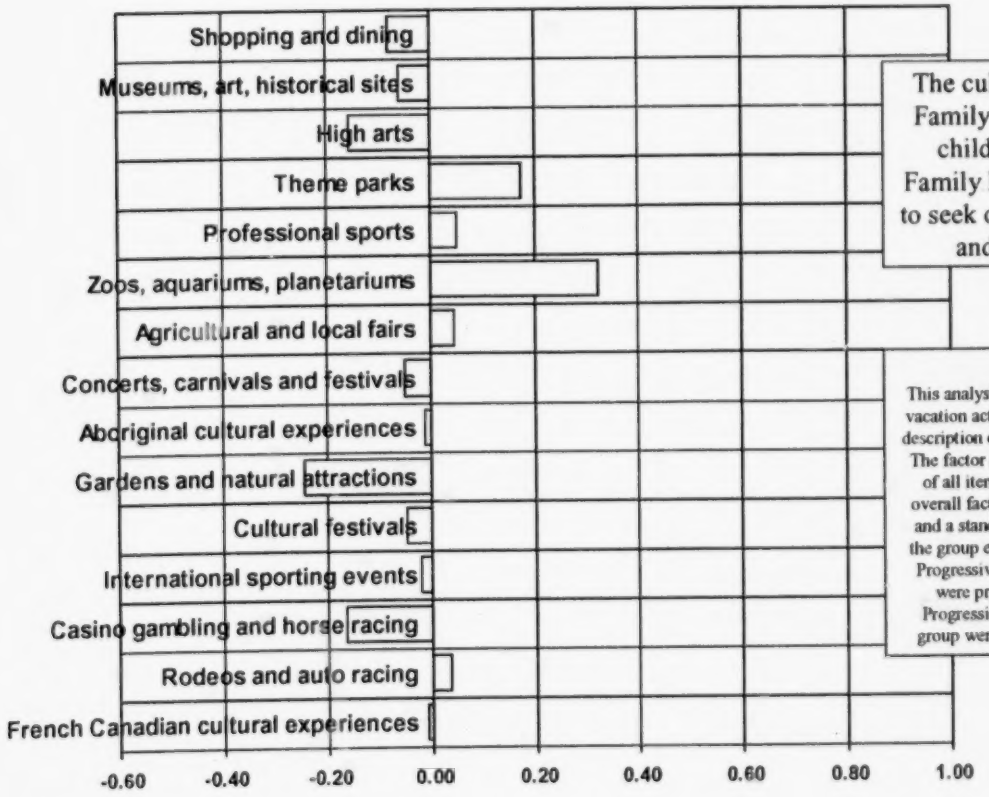
While not on vacation, the Family Market was slightly more likely to go swimming, participate in team sports, to go hunting and fishing and during the winter, to go ice skating or snowmobiling.

Technical Note

The Outdoor Activity Index was computed by dividing the incidence with which each activity was participated in by each segment by the incidence with which each activity was participated in within the total market of travellers. A score of 1.0 means that activity participation rate was the same as the total market of travellers. Index values above 1.0 indicate that the segment was more likely to participate in the activity while index values below 1.0 indicate that the segment was less likely to participate in the activity, relative to the total market of travellers. For example, an index value of 1.2 means that the Market segment was 20 percent more likely to participate in a given activity than the total market of travellers.

Family Market
Culture and Entertainment Activities Sought During Pleasure Travel in the Last Two Years

Base: Total Population (18-Plus) Who Took an Overnight Trip in Last Two Years: Canada and United States (Mailback Survey)



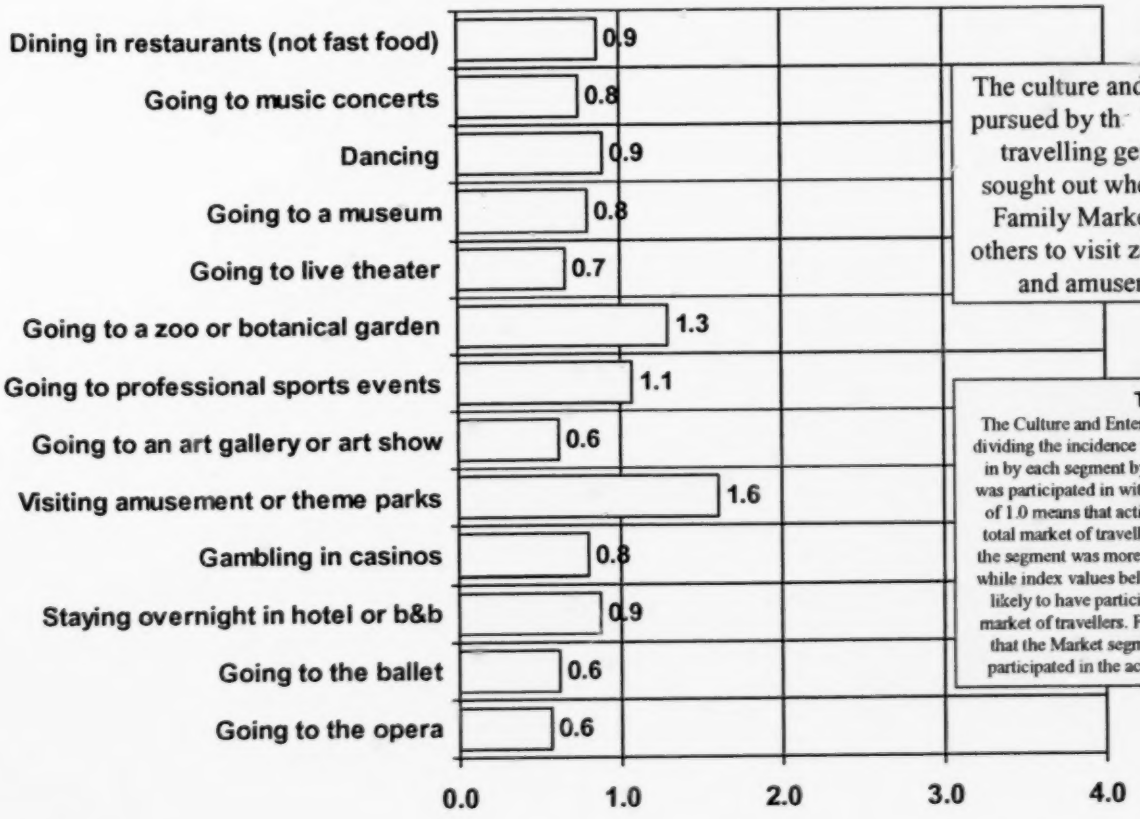
The cultural and entertainment activities in Family Market vacations tended to involve child-oriented attractions. As such, the Family Market was more likely than average to seek out zoos, aquariums and planetariums and theme parks while on vacation.

Technical Note

This analysis was based on a factor analysis of the culture and entertainment vacation activities sought during the past two years. See Appendix Five for a description of the individual items associated with each of these factor scores. The factor scores for each dimension were determined by the weighted sum of all items determined by how much any given item correlated with the overall factor score. Factor scores were standardised with an average of "0" and a standard deviation of "1". A value of "0" means that the travellers in the group exhibited an average tendency to pursue a given vacation activity. Progressively more positive values indicate that the travellers in the group were progressively more likely to have pursued the vacation activity. Progressively more negative values indicate that the travellers within the group were progressively less likely to have pursued the vacation activity.

Family Market
Culture and Entertainment Activities Sought While Not Travelling (Indexed)

Base: Total Population (18-Plus) Who Took an Overnight Trip in Last Two Years: Canada and United States (Mailback Survey)



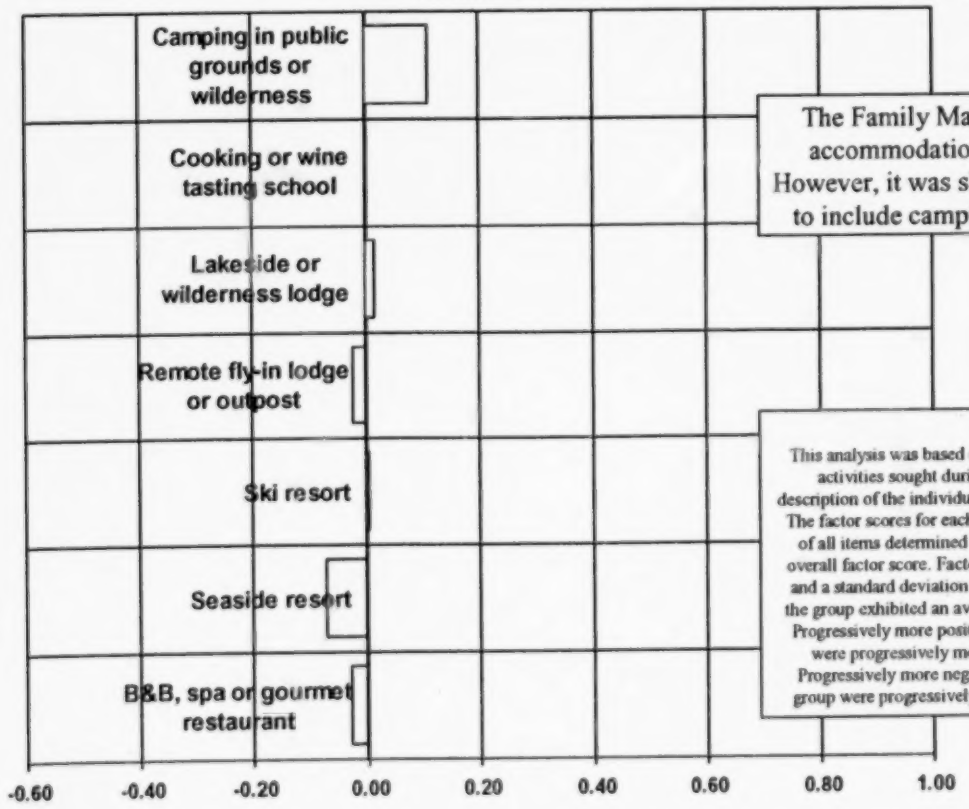
The culture and entertainment activities pursued by the Family Market when not travelling generally mirrored those sought out when they travel. Thus, the Family Market was more likely than others to visit zoos or botanical gardens, and amusement or theme parks.

Technical Note

The Culture and Entertainment Activity Index is computed by dividing the incidence with which each activity was participated in by each segment by the incidence with which each activity was participated in within the total market of travellers. A score of 1.0 means that activity participation rate is the same as the total market of travellers. Index values above 1.0 indicate that the segment was more likely to have participated in the activity while index values below 1.0 indicate that the segment was less likely to have participated in the activity relative to the total market of travellers. For example, an index value of 1.2 means that the Market segment was 20 percent more likely to have participated in the activity than the total market of travellers.

Family Market
Accommodation-Related Activities Sought During Pleasure Travel in the Last Two Years

Base: Total Population (18-Plus) Who Took an Overnight Trip in Last Two Years: Canada and United States (Mailback Survey)



The Family Market was not distinctive in its accommodation-related vacation activities. However, it was slightly more likely than average to include camping among vacation activities.

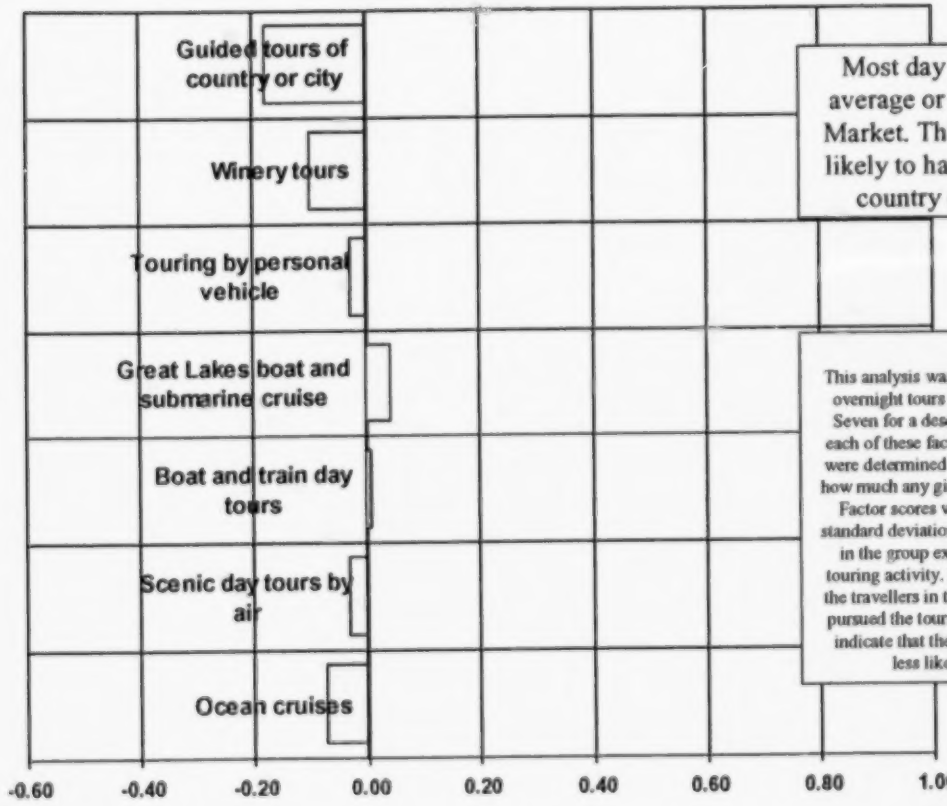
Technical Note

This analysis was based on a factor analysis of the accommodation-related activities sought during the past two years. See Appendix Six for a description of the individual items associated with each of these factor scores. The factor scores for each dimension were determined by the weighted sum of all items determined by how much any given item correlated with the overall factor score. Factor scores were standardised with an average of "0" and a standard deviation of "1". A value of "0" means that the travellers in the group exhibited an average tendency to pursue a given vacation activity. Progressively more positive values indicate that the travellers in the group were progressively more likely to have pursued the vacation activity. Progressively more negative values indicate that the travellers within the group were progressively less likely to have pursued the vacation activity.

Family Market

Day and Overnight Touring Activities in the Last Two Years

Base: Total Population (18-Plus) Who Took an Overnight Trip in Last Two Years.
Canada and United States (Mailback Survey)



Most day and overnight touring activities had average or below-average appeal for the Family Market. The Family Market was particularly less likely to have taken a guided tour of a city or the country during the past two years of travel.

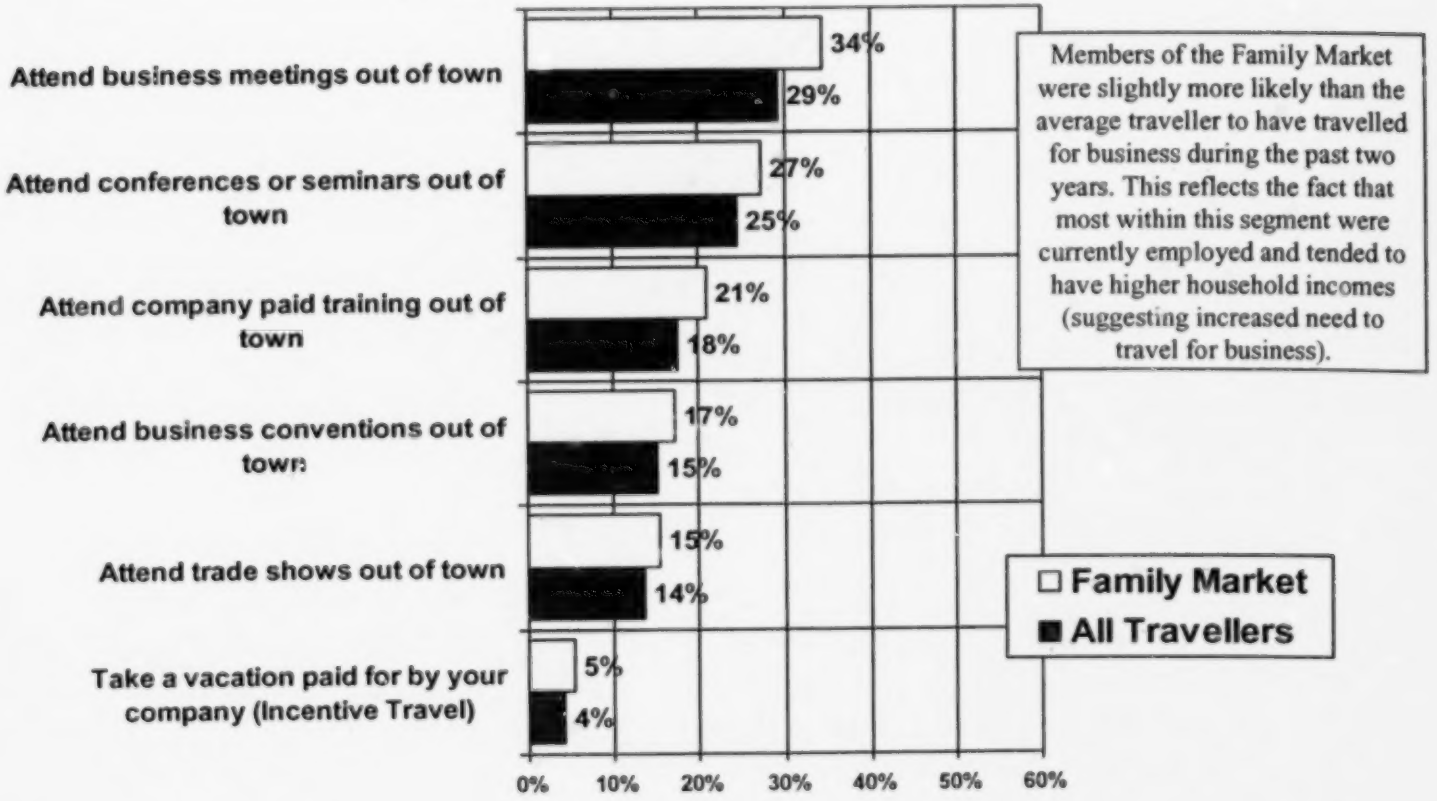
Technical Note

This analysis was based on a factor analysis of the same-day and overnight tours taken during the past two years. See Appendix Seven for a description of the individual items associated with each of these factor scores. The factor scores for each dimension were determined by the weighted sum of all items determined by how much any given item correlated with the overall factor score. Factor scores were standardised with an average of "0" and a standard deviation of "1". A value of "0" means that the travellers in the group exhibited an average tendency to pursue a given touring activity. Progressively more positive values indicate that the travellers in the group were progressively more likely to have pursued the touring activity. Progressively more negative values indicate that the travellers within the group were progressively less likely to have pursued the touring activity.

Family Market

Percent Taking Various Types of Overnight Business Trips in Last Two Years

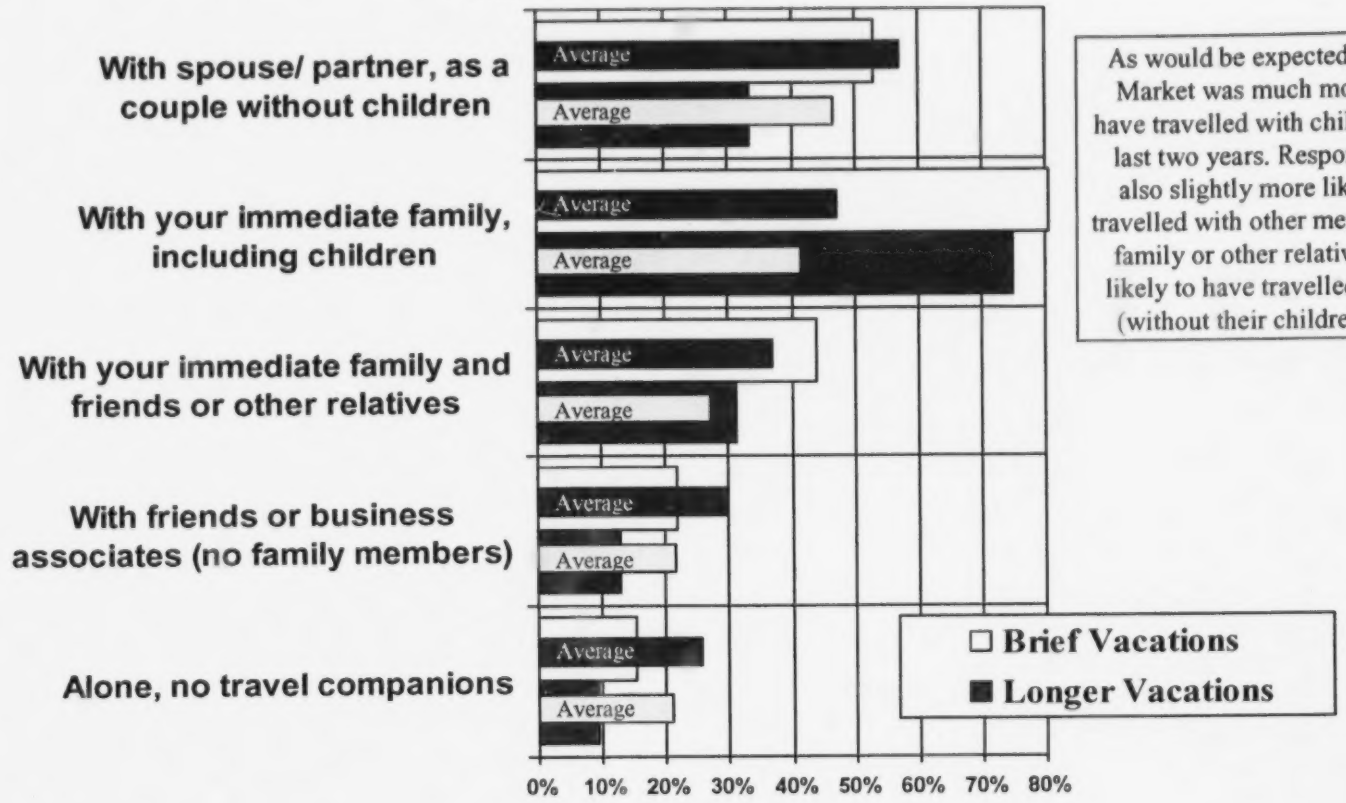
Base: Total Population (18-Plus) Who Took an Overnight Trip in Last Two Years: Canada and United States (Mailback Survey)



Family Market

Composition of Travel Party for Brief and Long Trips In Last Two Years

Base: Total Population (18-Plus) Who Took an Overnight Trip in Last Two Years: Canada and United States (Mailback Survey)

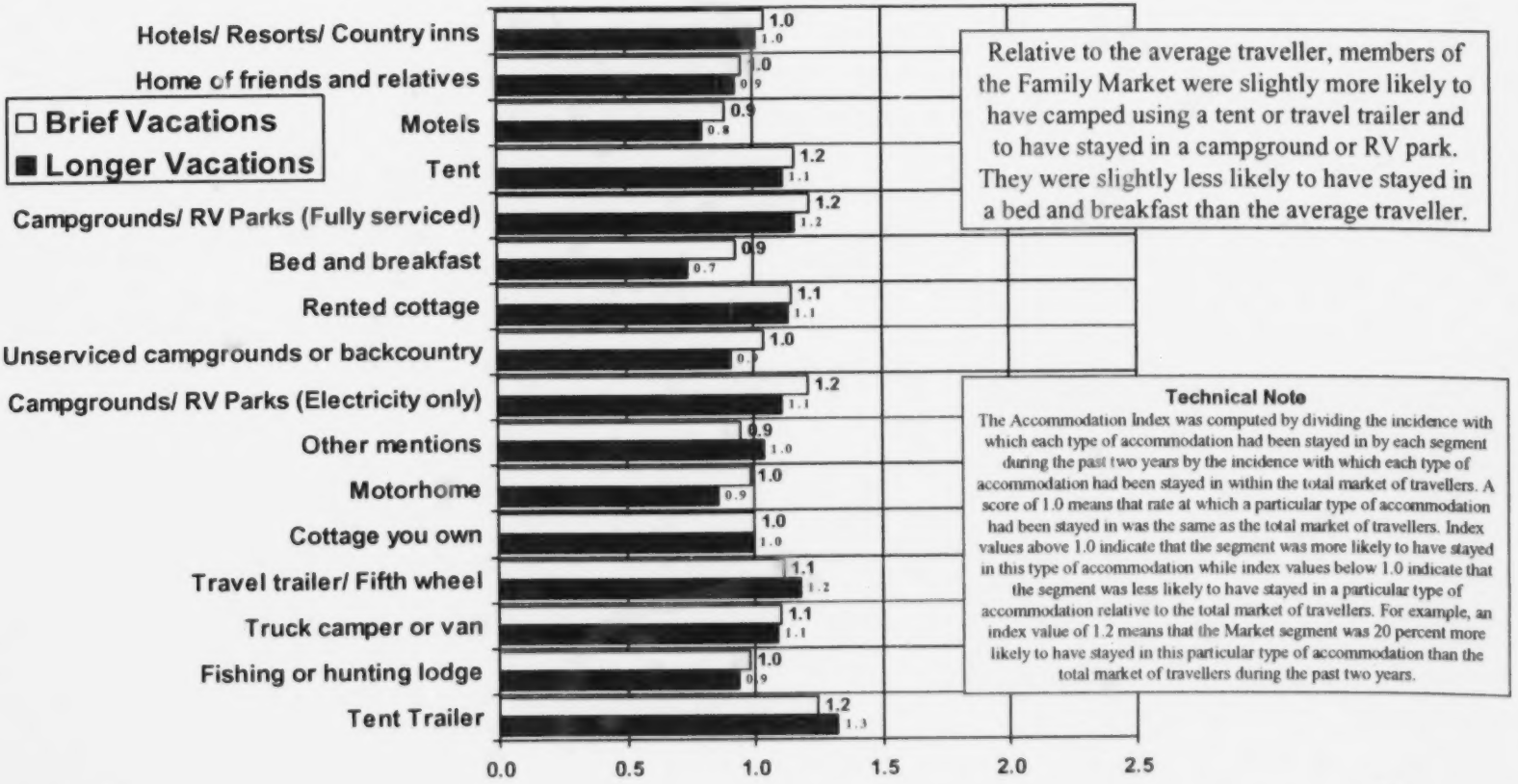


As would be expected, the Family Market was much more likely to have travelled with children over the last two years. Respondents were also slightly more likely to have travelled with other members of their family or other relatives, and less likely to have travelled as a couple (without their children) or alone.

Family Market

Types of Accommodations Used for Brief and Longer Trips In Last Two Years (Indexed)

Base: Total Population (18-Plus) Who Took an Overnight Trip in Last Two Years: Canada and United States (Mailback Survey)



Relative to the average traveller, members of the Family Market were slightly more likely to have camped using a tent or travel trailer and to have stayed in a campground or RV park. They were slightly less likely to have stayed in a bed and breakfast than the average traveller.

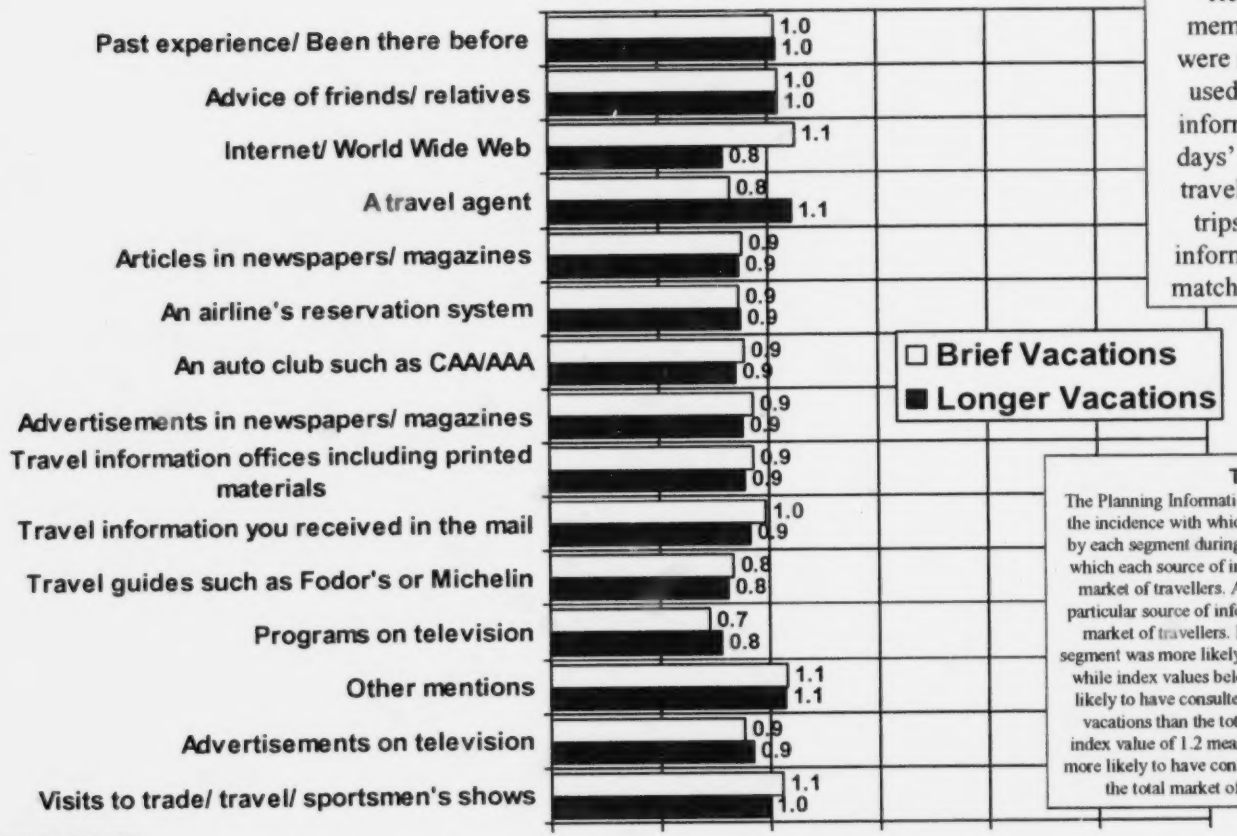
Technical Note

The Accommodation Index was computed by dividing the incidence with which each type of accommodation had been stayed in by each segment during the past two years by the incidence with which each type of accommodation had been stayed in within the total market of travellers. A score of 1.0 means that rate at which a particular type of accommodation had been stayed in was the same as the total market of travellers. Index values above 1.0 indicate that the segment was more likely to have stayed in this type of accommodation while index values below 1.0 indicate that the segment was less likely to have stayed in a particular type of accommodation relative to the total market of travellers. For example, an index value of 1.2 means that the Market segment was 20 percent more likely to have stayed in this particular type of accommodation than the total market of travellers during the past two years.

Family Market

Information Sources Used to Plan Brief and Longer Trips In Last Two Years (Indexed)

Base: Total Population (18-Plus) Who Took an Overnight Trip in Last Two Years: Canada and United States (Mailback Survey)



Relative to other travellers, members of the Family Market were slightly more likely to have used the Internet as a source of information for brief trips (1 to 3 days' duration), and to have used travel agents for planning longer trips. Beyond this, their use of information sources to plan travel matched the overall travel market.

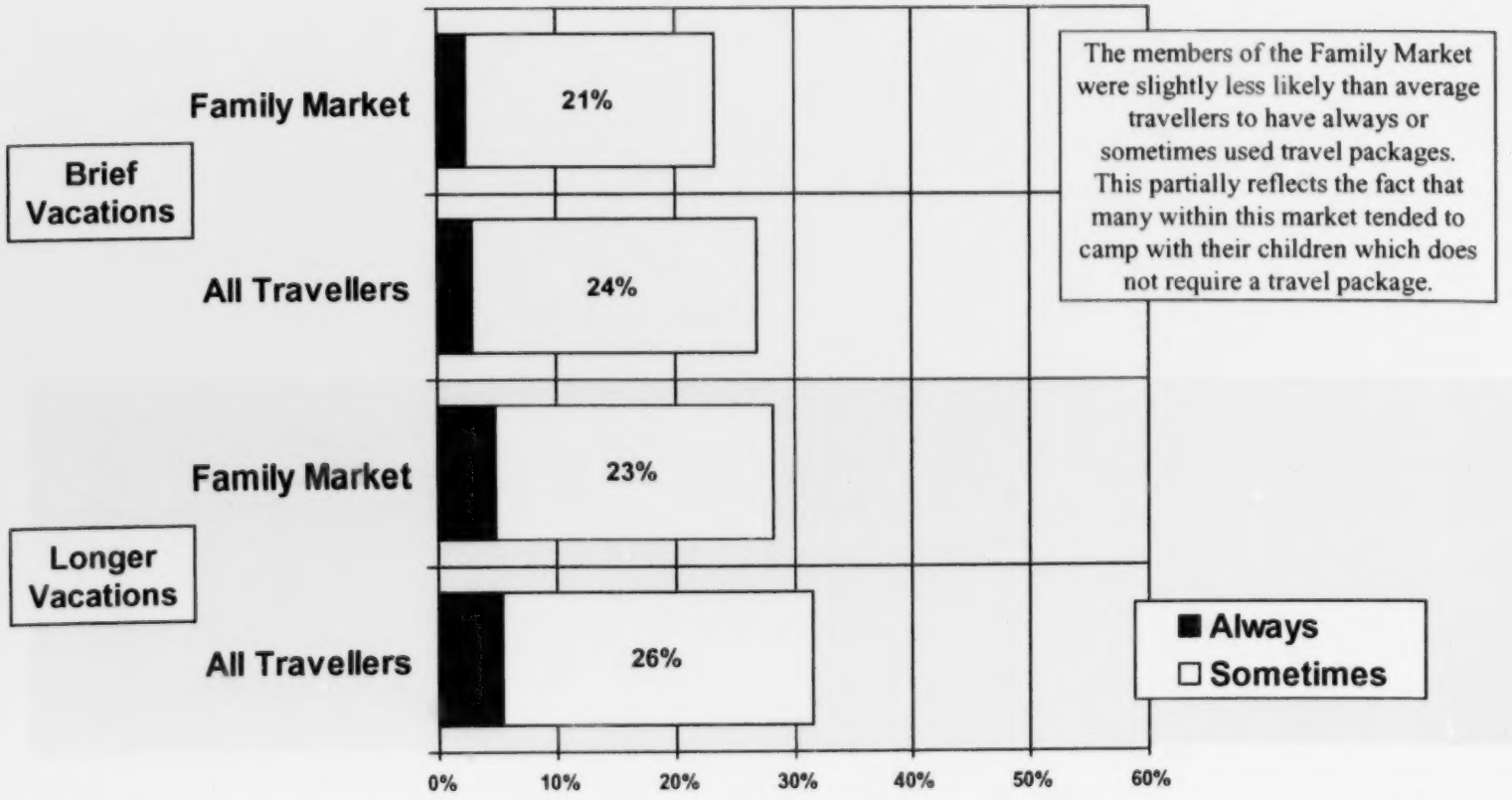
Technical Note

The Planning Information Used Index was computed by dividing the incidence with which each information source was consulted by each segment during the past two years by the incidence with which each source of information was consulted within the total market of travellers. A score of 1.0 means that rate at which a particular source of information was used is the same as the total market of travellers. Index values above 1.0 indicate that the segment was more likely to consult a particular information source while index values below 1.0 indicate that the segment was less likely to have consulted a particular information source to plan vacations than the total market of travellers. For example, an index value of 1.2 means that the Family Market was 20 percent more likely to have consulted a particular information source than the total market of travellers during the past two years.

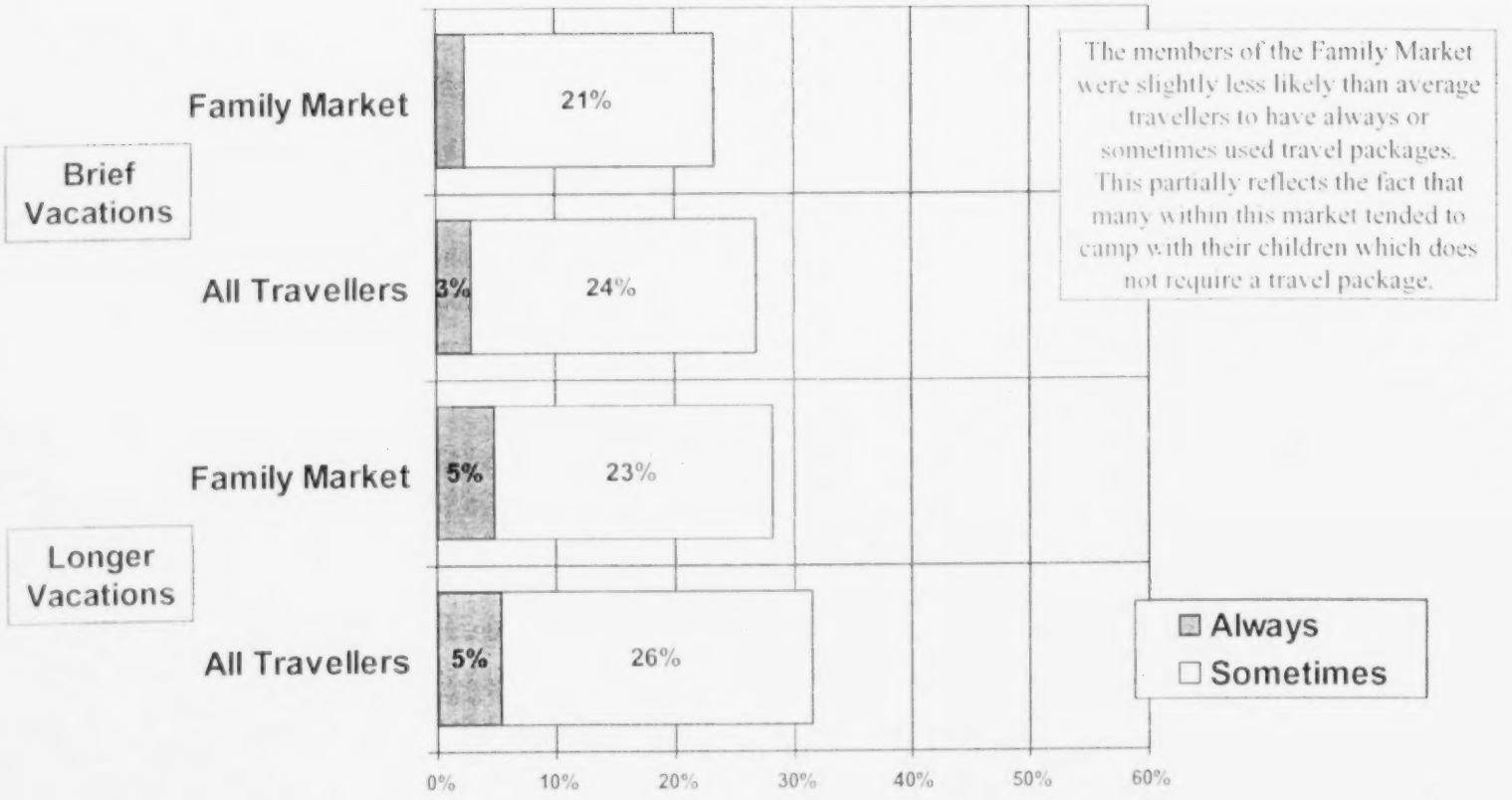
Family Market

How Often Travel Packages Used for Brief And Longer Vacations in Last Two Years

Base: Total Population (18-Plus) Who Took an Overnight Trip in Last Two Years: Canada and United States (Mailback Survey)



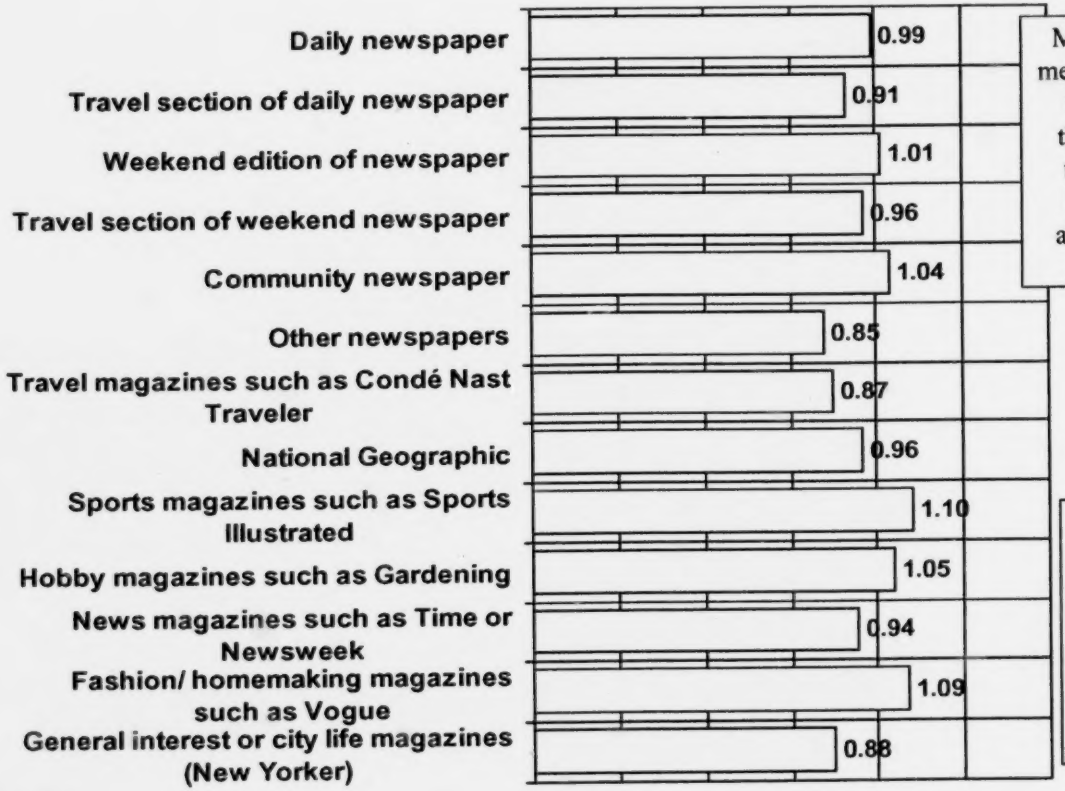
The members of the Family Market were slightly less likely than average travellers to have always or sometimes used travel packages. This partially reflects the fact that many within this market tended to camp with their children which does not require a travel package.


Family Market
Brief Vacations
All Travellers
3%
24%
21%
Family Market
Longer Vacations
All Travellers
5%
23%
5%
26%
0%
10%
20%
30%
40%
50%
60%
Always
Sometimes
The members of the Family Market were slightly less likely than average travellers to have always or sometimes used travel packages. This partially reflects the fact that many within this market tended to camp with their children which does not require a travel package.

Family Market Media Index for Print Media: Canada and U.S.

Percent Reading Each Publication Type in Segment By Percent Reading Each Publication Type Among Travellers

Base: Total Population (18-Plus) Who Took an Overnight Trip in Last Two Years: Canada and United States (Mailback Survey)



Media indexing for various types of print media (see Technical Note below) indicates that the Family Market is best reached through popular publications rather than through specialised travel publications. Family Market readership was slightly above-average for sports magazines, and fashion and homemaking magazines.

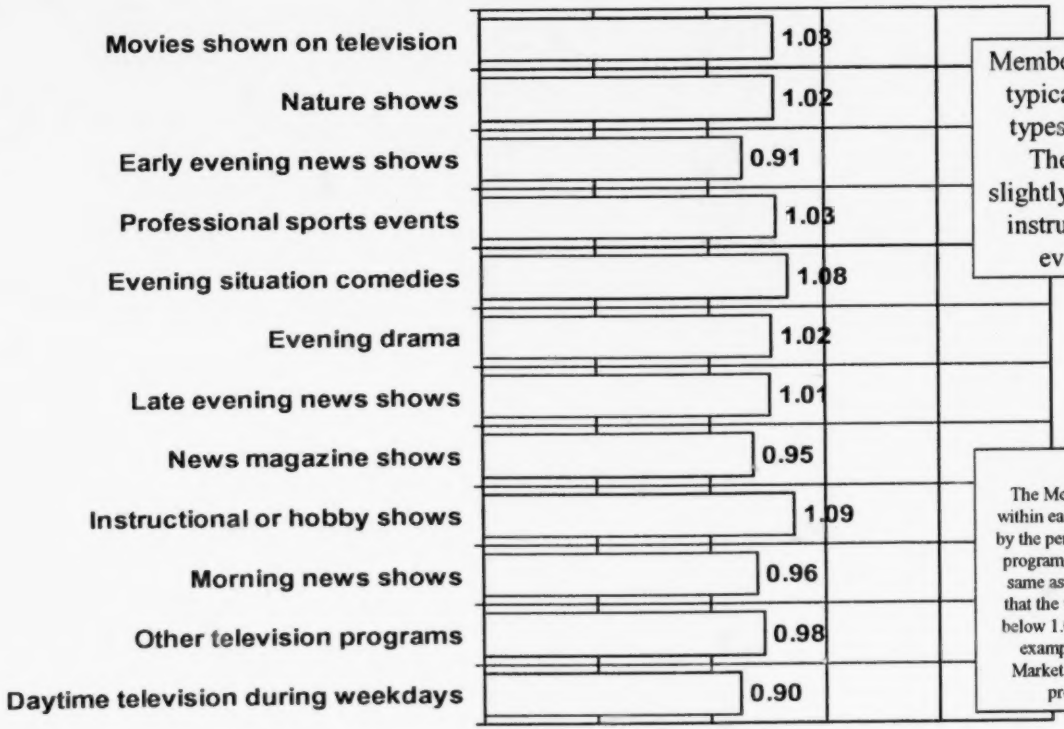
Technical Note

The Media Index was computed by dividing the percent within each segment that routinely read each publication by the percent in the total market that routinely read each publication. A score of 1.0 means that readership was the same as the total market. Index values above 1.0 indicate that the readership was above average while index values below 1.0 indicate that readership was below average. For example, an index value of 1.2 means that the Family Market was 20 percent more likely to read a particular publication than the total market of travellers.

Family Market Media Index for Television: Canada and U.S.

Percent Watching Each Type of Programme in Segment
By Percent Watching Each Type of Programme Among Travellers

Base: Total Population (18-Plus) Who Took an Overnight Trip in Last Two Years:
Canada and United States (Mailback Survey)



Members of the Family Market were typically average viewers of most types of television programming. The only exceptions involved slightly above-average viewership of instructional or hobby shows, and evening situation comedies.

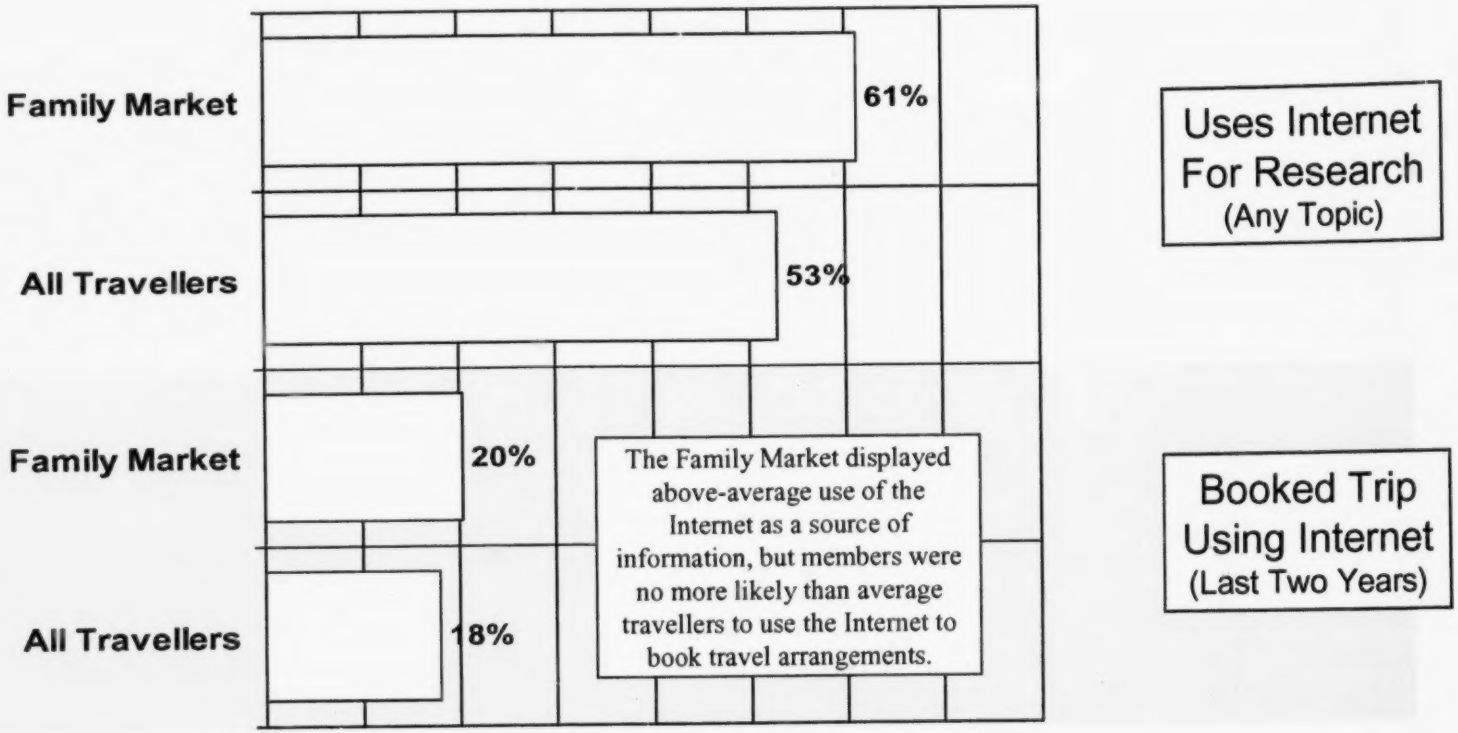
Technical Note

The Media Index was computed by dividing the percent within each segment that routinely viewed each programme by the percent in the total market that routinely viewed each programme. A score of 1.0 means that viewership was the same as the total market. Index values above 1.0 indicate that the viewership was above average while index values below 1.0 indicate that viewership was below average. For example, an index value of 1.2 means that the Family Market was 20 percent more likely to watch a particular programme than the total market of travellers.

Family Market

Percent Using Internet and Booking at Least One Trip Using the Internet

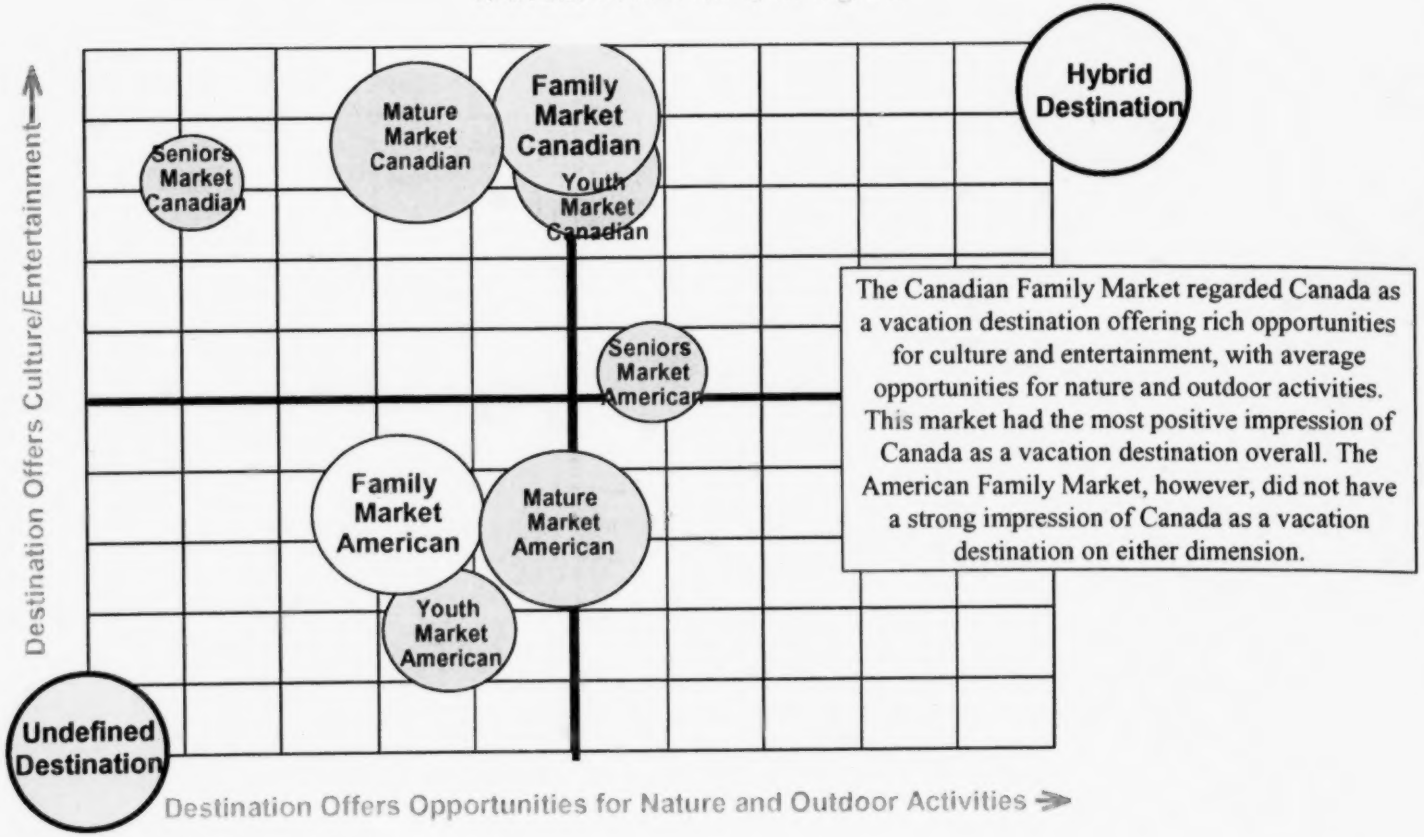
Base: Total Population (18-Plus) Who Took an Overnight Trip in Last Two Years: Canada and United States (Mailback Survey)



Family Market
Vacation Image of Canada

Base: Total Population (18-Plus) Who Took an Overnight Trip in Last Two Years and Were Able to Rate Canada On One-Plus Attributes: Canada and United States (Mailback Survey)

Circle Size Denotes Size of the Segment



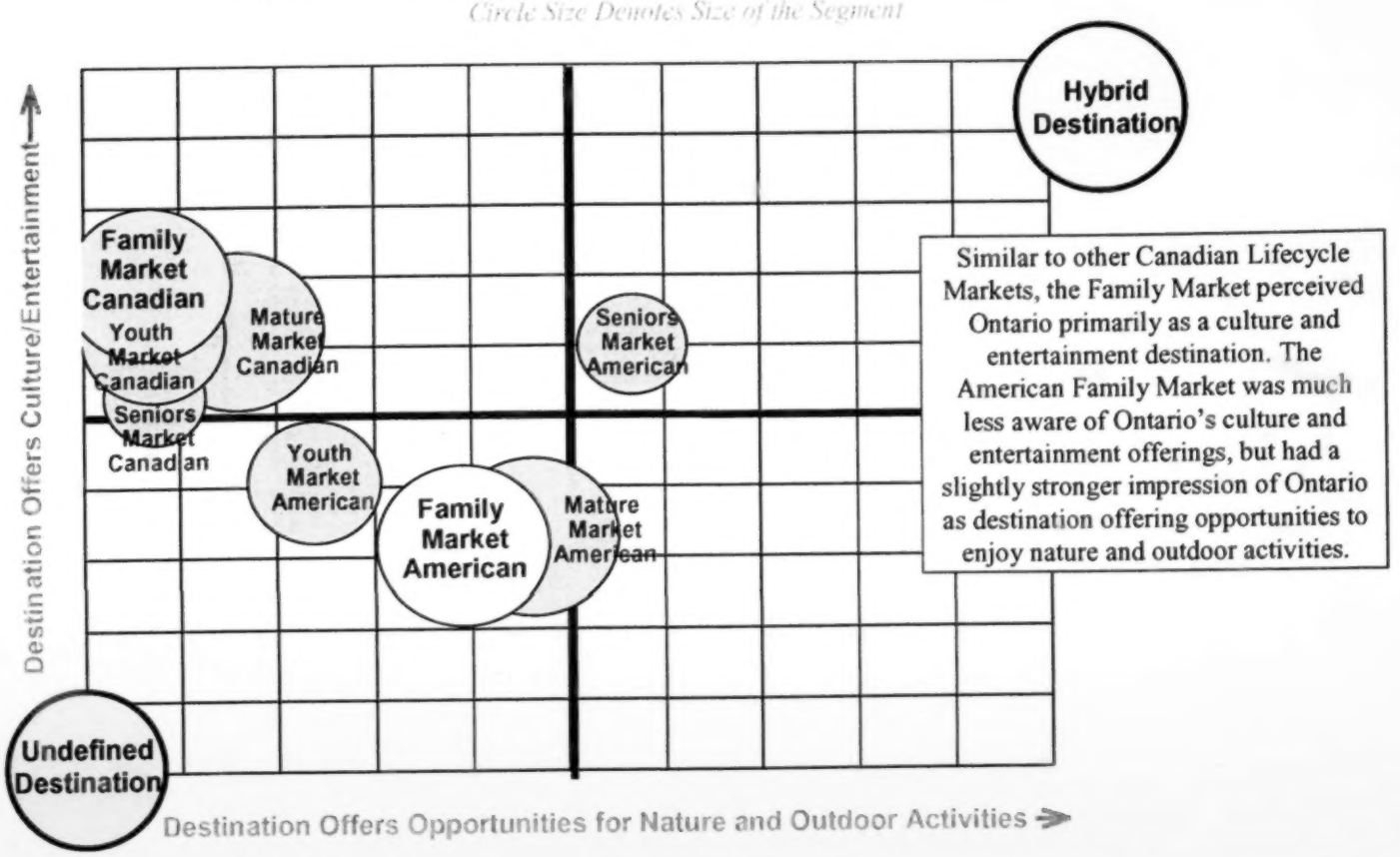
The Canadian Family Market regarded Canada as a vacation destination offering rich opportunities for culture and entertainment, with average opportunities for nature and outdoor activities. This market had the most positive impression of Canada as a vacation destination overall. The American Family Market, however, did not have a strong impression of Canada as a vacation destination on either dimension.

Family Market

Vacation Image of Ontario

Base: Total Population (18-Plus) Who Took an Overnight Trip in Last Two Years and Were Able to Rate Canada On One-Plus Attributes: Canada and United States (Mailback Survey)

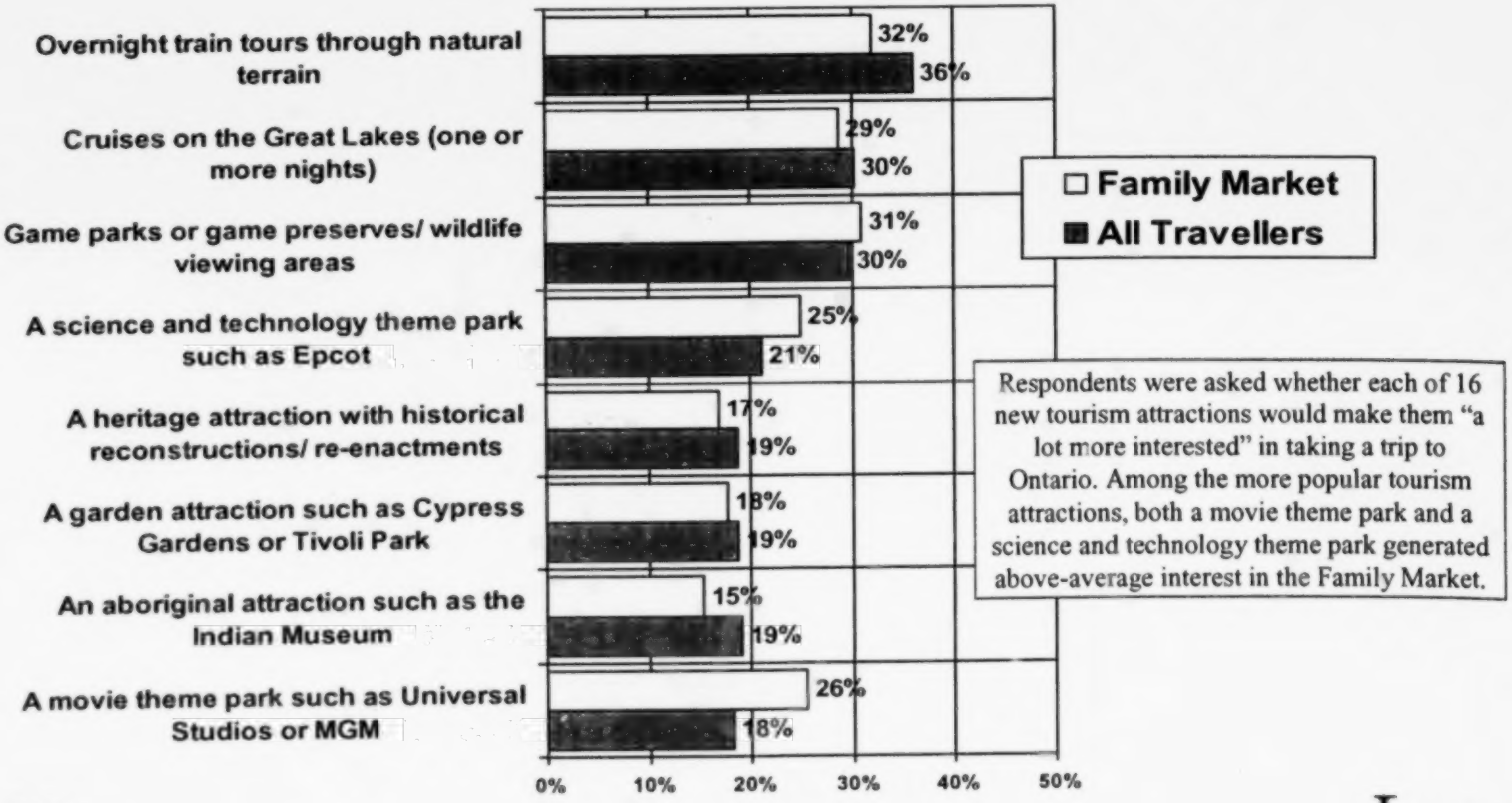
Circle Size Denotes Size of the Segment



Family Market Interest in New Tourism Products (Part One of Two)

Percent Stating Attraction Would Make Them "A Lot More Interested" in Taking a Trip to Ontario

Base: Total Population (18-Plus) Who Took a Trip in Last Two Years: Canada and United States (Mailback Survey)

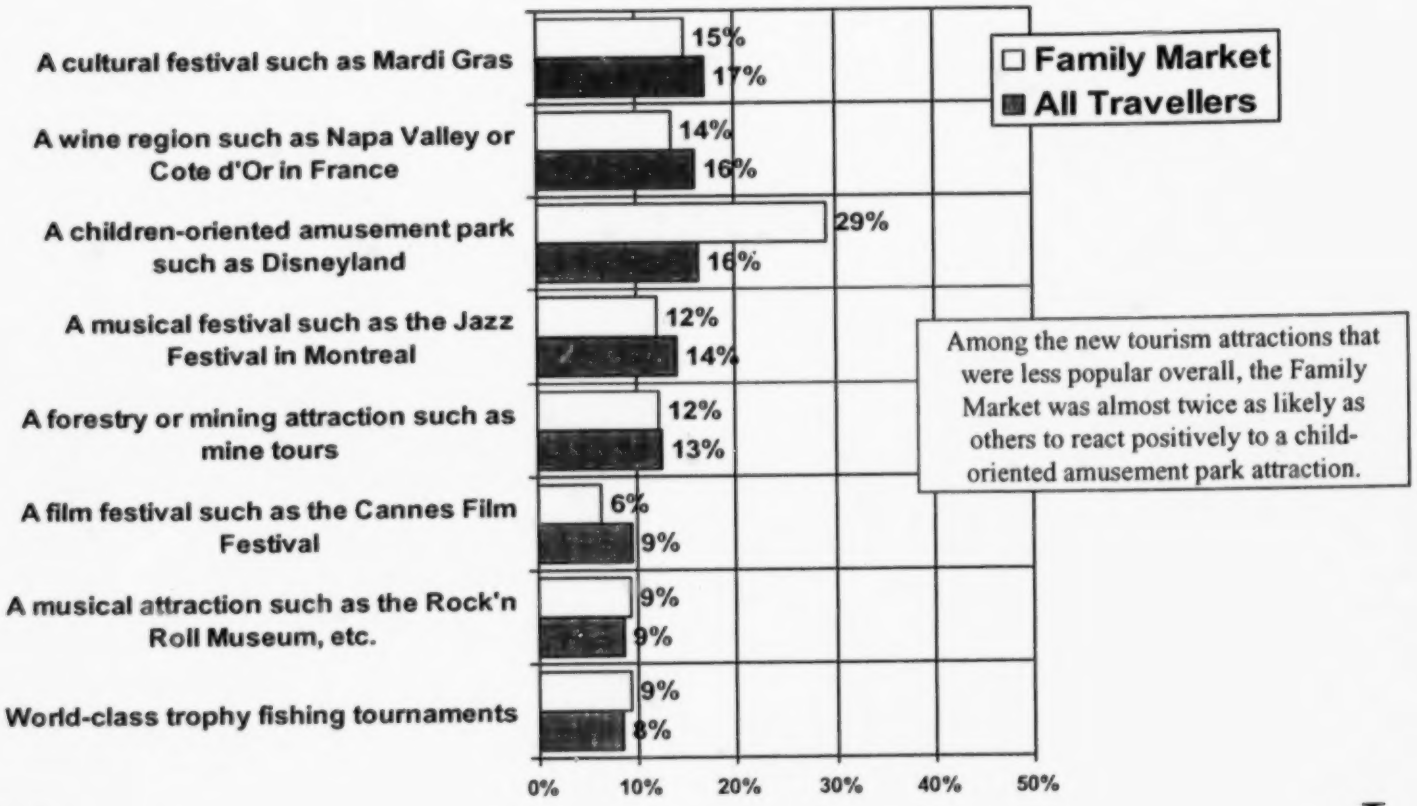


Respondents were asked whether each of 16 new tourism attractions would make them "a lot more interested" in taking a trip to Ontario. Among the more popular tourism attractions, both a movie theme park and a science and technology theme park generated above-average interest in the Family Market.

Family Market Interest in New Tourism Products (Part Two of Two)

Percent Stating Attraction Would Make Them "A Lot More Interested" in Taking a Trip to Ontario

Base: Total Population (18-Plus) Who Took a Trip in Last Two Years: Canada and United States (Mailback Survey)



SectionFive

Mature Market

Detailed Lifecycle Market Profile

Mature Market

The Mature Market represented one-third (32 percent) of the total travel market, and tended to be relatively well-educated and affluent. Women and men were equally represented in this Lifecycle Market in Canada, but there were more men than women in the American Mature Market.

The Mature Market's previous behaviour and future intentions for travel in Canada parallelled those of the average traveller.

The Mature Market respondents were slightly more likely than average travellers to seek out exploratory vacation activities. On the other hand, this market tended to be somewhat less active in outdoor pursuits while on vacation than either the Youth or Family Markets. Respondents were more likely than average travellers to have gone natural sight-seeing, visited gardens and natural attractions, gambled at casinos or horse races, visited agricultural and local fairs, museums, art galleries and historical sites, shopped and dined, and visited aboriginal cultural attractions or events while travelling during the past two years.

The Mature Market was also more likely than others to stay at seaside resorts, toured using their personal vehicle or to have taken a winery tour during the past two years. Respondents were slightly above-average users of travel packages.

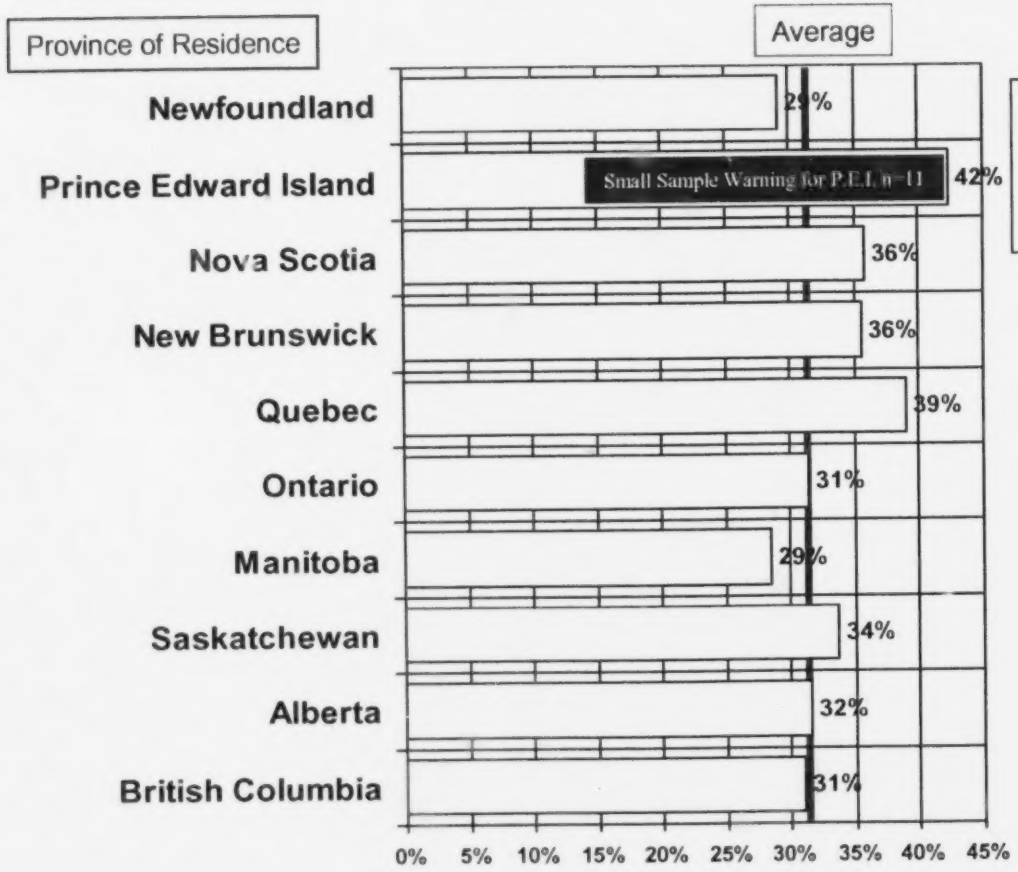
Members of the Mature Market were more likely than others to have travelled with a spouse or partner without children during the past two years. They were somewhat less likely to have travelled with children, other family members or friends, but slightly more likely than the average traveller to have travelled alone.

The Mature Market considers television programmes to be an important source of travel information. Targeting this market via television is aided by its above-average viewership of most types of news programming (e.g., newsmagazine shows, morning news shows, early evening news shows).

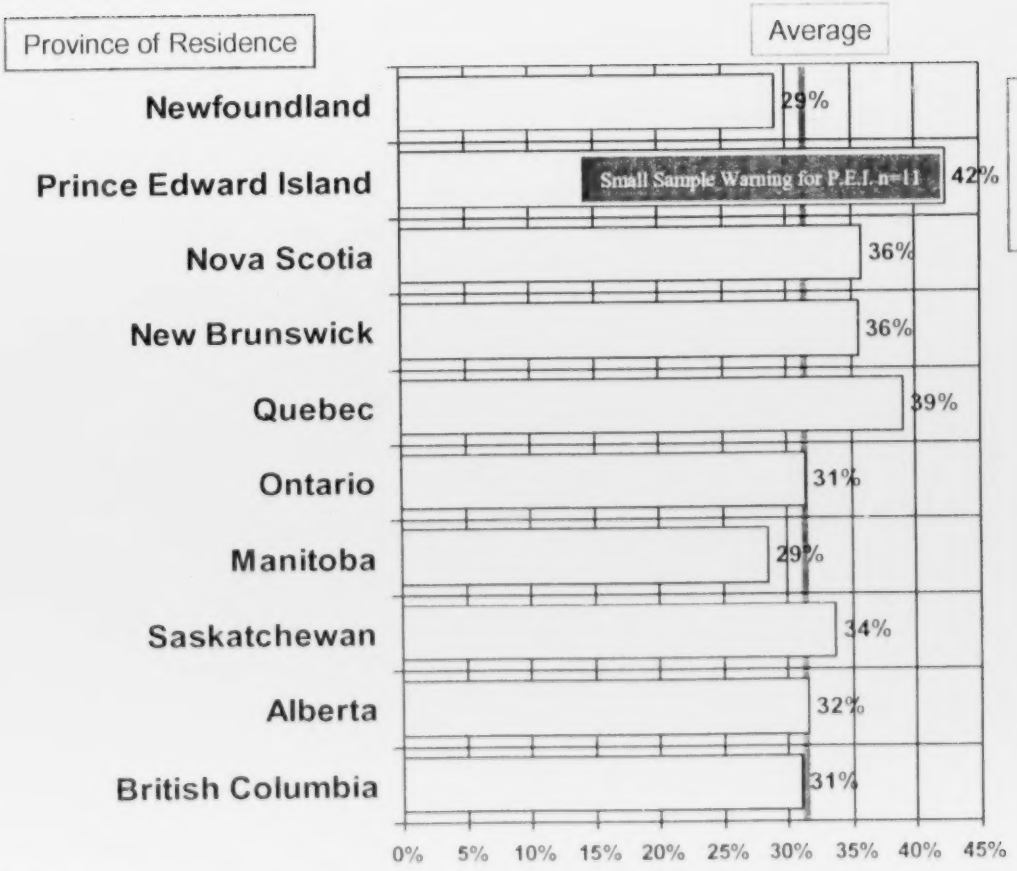
The Mature Market was also more likely than average to consult information from travel shows, auto clubs and newspaper or magazine articles, and to read specialised travel publications (e.g., travel sections of newspapers, travel magazines).

Lifecycle Markets Incidence in Canada
Mature Market: By Province

Base: Adult (18-Plus) Canadian Population Who Took a Trip or Plans to Take a Trip in Last/Next Two Years



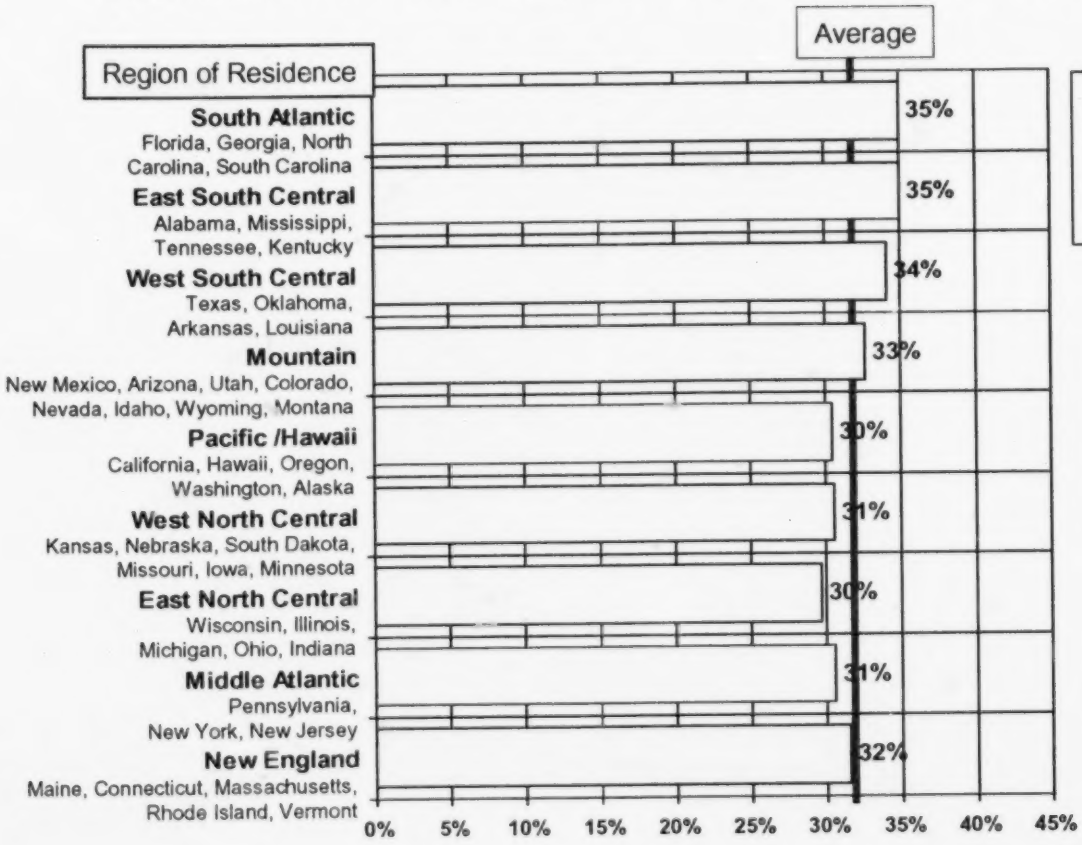
Quebec and Prince Edward Island were more likely than other provinces to be home to Mature Market travellers (although the latter finding was based on a very small sample of 11 respondents).



Quebec and Prince Edward Island were more likely than other provinces to be home to Mature Market travellers (although the latter finding was based on a very small sample of 11 respondents).

Lifecycle Markets Incidence in United States
Mature Market: By U.S. Region

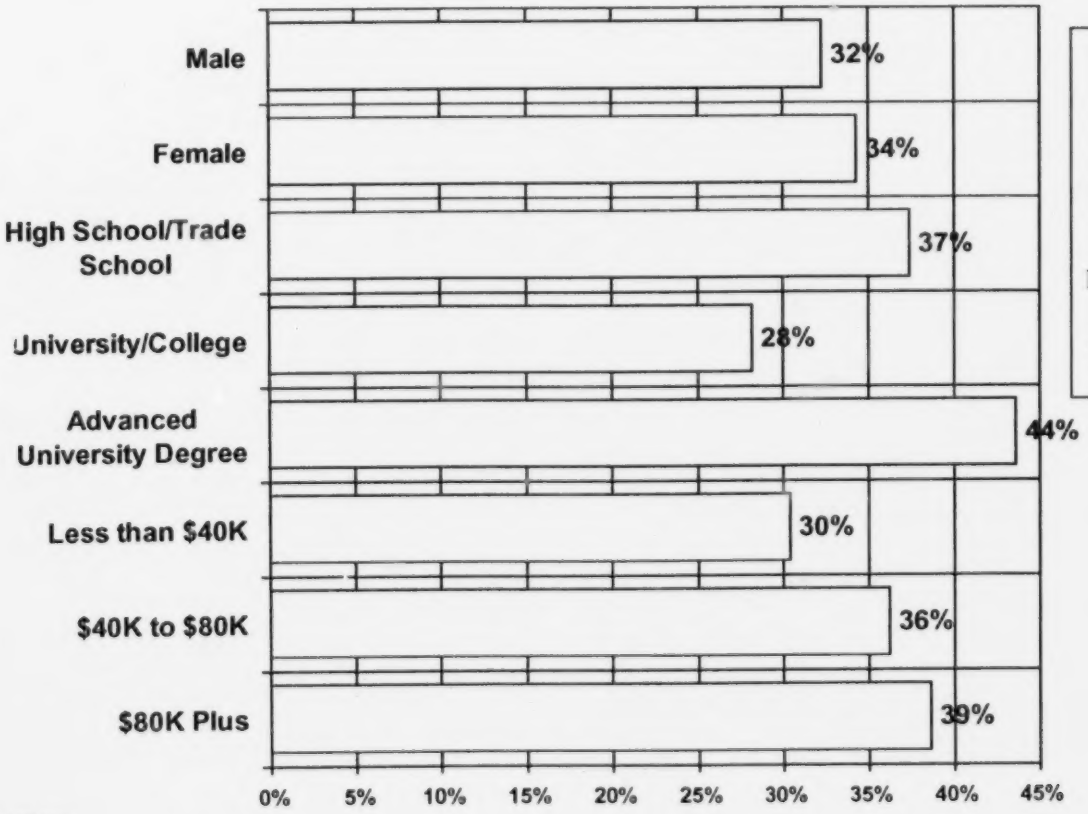
Base: Adult (18-Plus) American Population Who Took a Trip or Plans to Take a Trip in Last/Next Two Years



Taken together, the southern regions (South Atlantic, East South Central, West South Central) had slightly higher representations of the Mature Market than other parts of the United States.

Lifecycle Markets: Mature Market
Canada: By Demographics

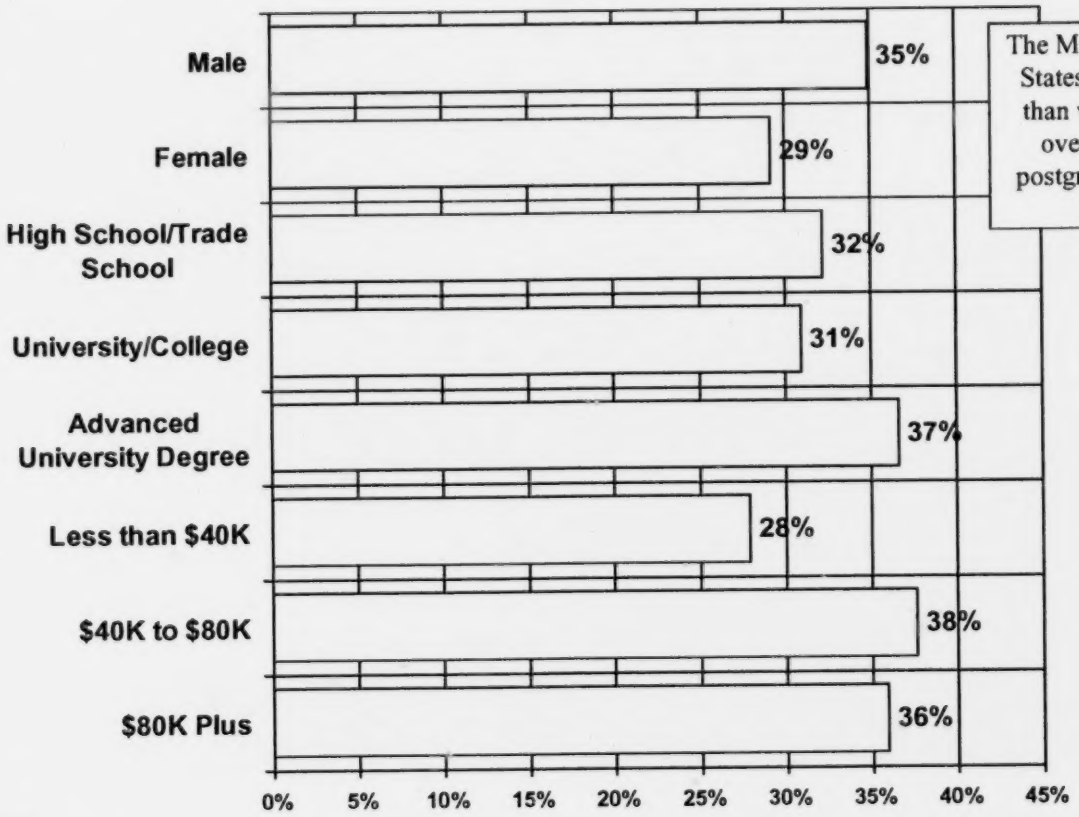
Base: Percent of Population (18-Plus) Who Either travelled in Last Two Years Or Intends to Travel in Next Two Years



Women and men were roughly equally represented in the Mature Market. Although educational attainment was somewhat polarised in the Mature Market between those with high school education or less and those with postgraduate education, this market was over-represented among higher income households.

Lifecycle Markets: Mature Market
United States: By Demographics

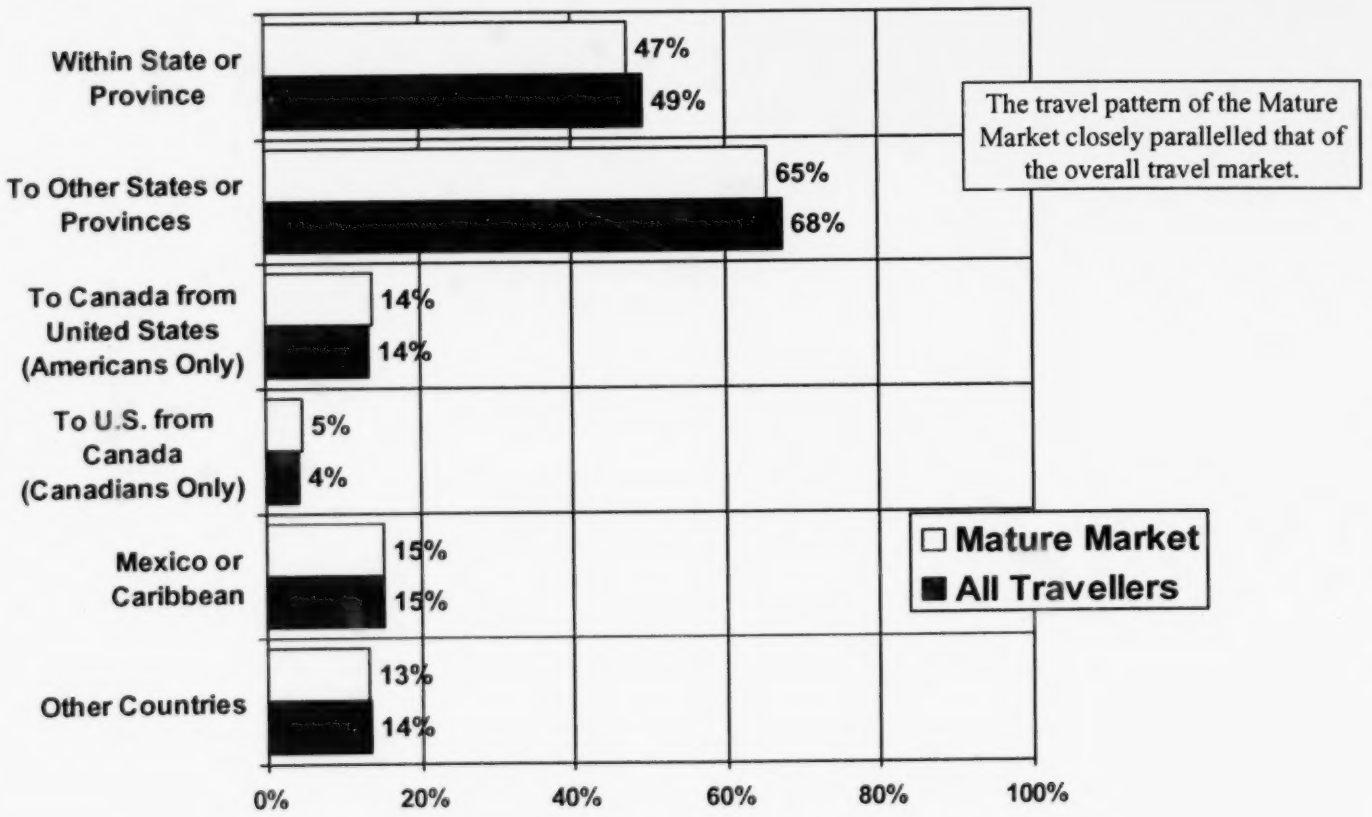
Base: Percent of Population (18-Plus) Who Either travelled in Last Two Years Or Intends to Travel in Next Two Years



The Mature Market survey in the United States had a higher percentage of men than women. The Mature Market was overrepresented among those with postgraduate degrees and in middle- to higher-income households.

Mature Market
Percent Taking Overnight Pleasure Trips To Various Destinations in Last Two Years

Base: Adult (18-Plus) American/Canadian Population Who Took an Overnight Trip in the Last Two Years

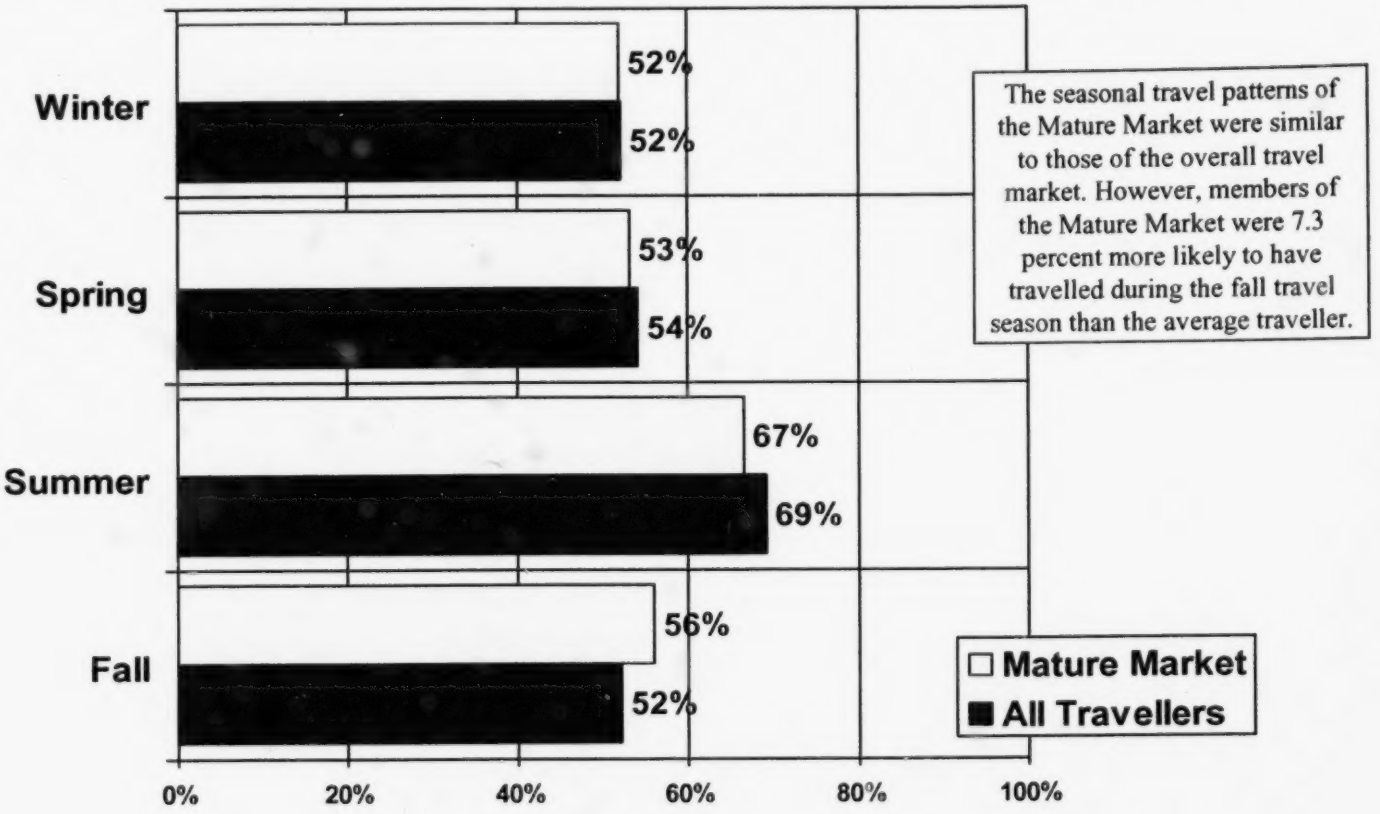


The travel pattern of the Mature Market closely parallelled that of the overall travel market.

Mature Market

Percent Taking Overnight Pleasure Trips To Various Destinations by Season in Last Two Years

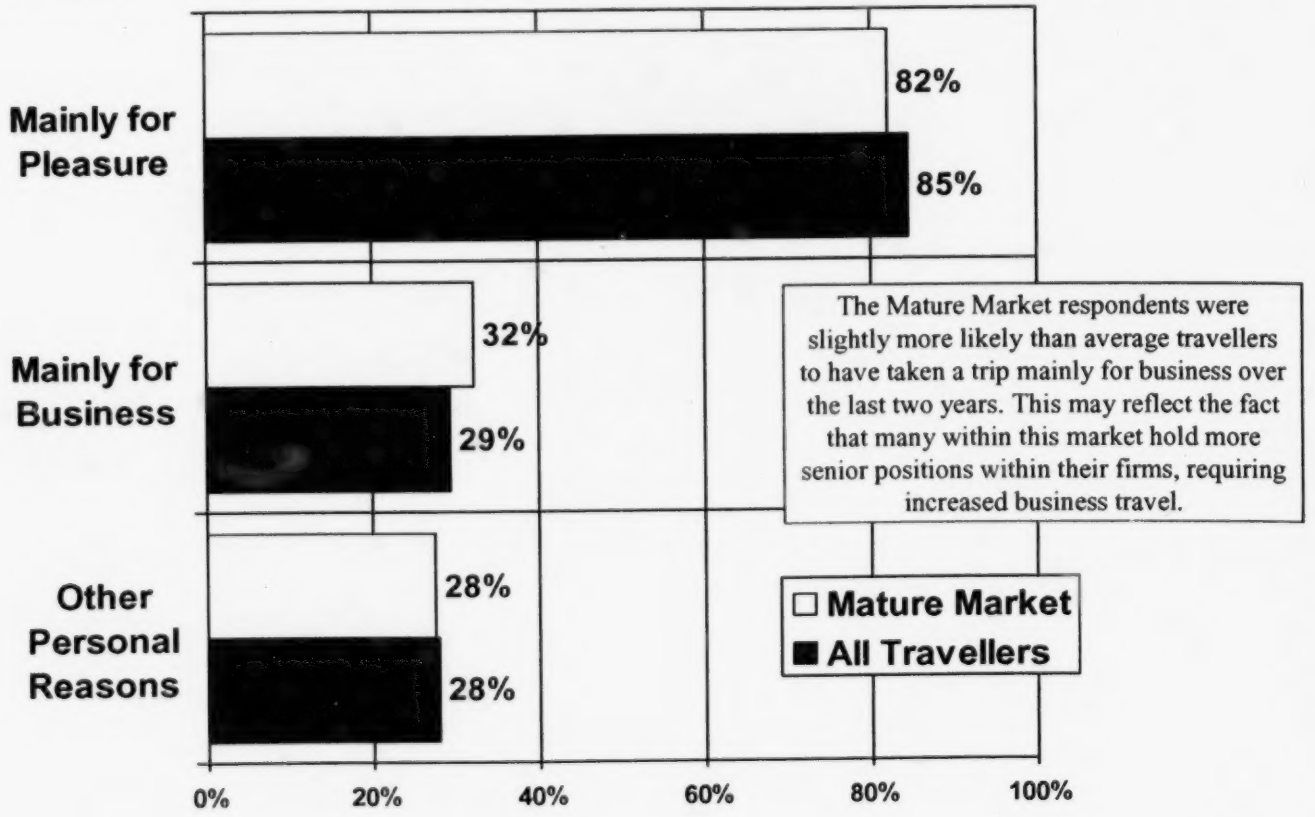
Base: Adult (18-Plus) American/Canadian Population Who Took an Overnight Trip in Last Two Years



Mature Market

Percent Taking Overnight Pleasure Trip to Various Destinations For Various Reasons in Last Two Years

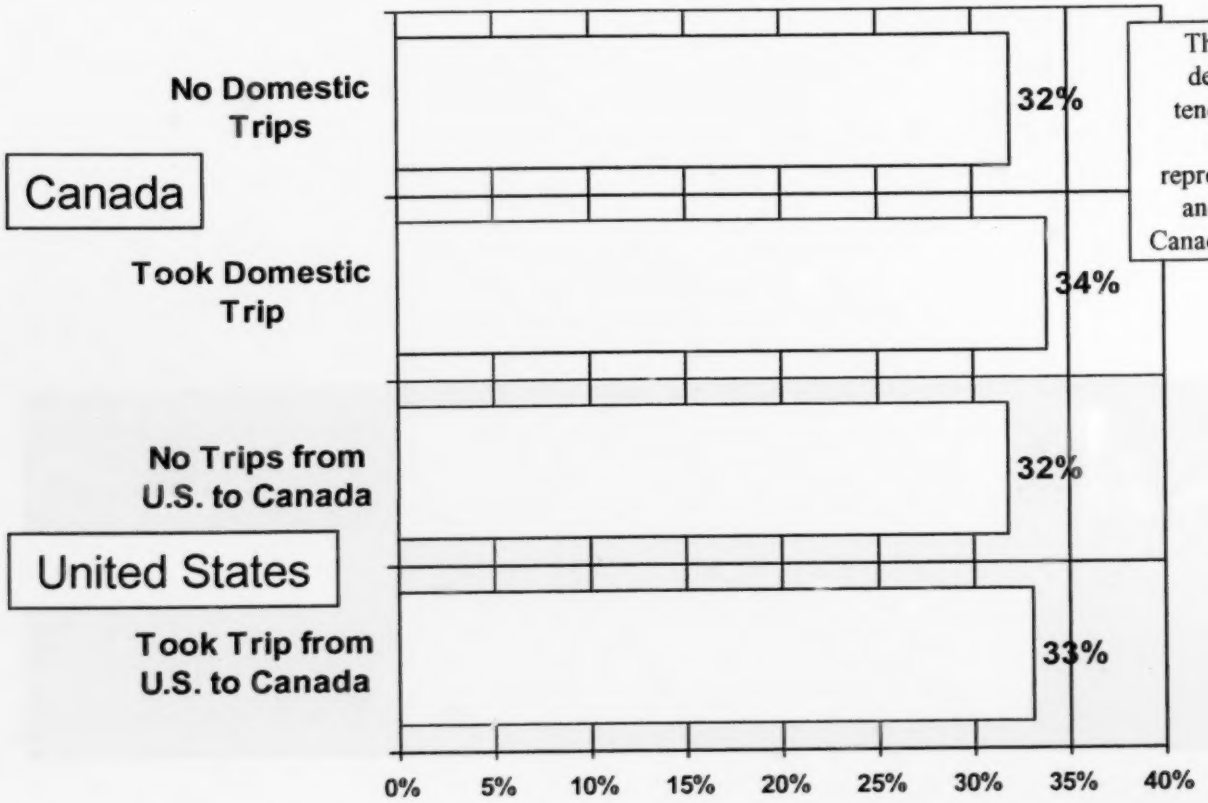
Base: Adult (18-Plus) American/Canadian Population Who Took an Overnight Trip in Last Two Years



Mature Market

Canada vs. U.S.: By Trips In Canada Last Two Years, Percent Taking at Least One Trip in Canada Within Last Two Years

Base: Percent of Population (18-Plus) Who Either travelled in Last Two Years Or Intends to Travel in Next Two Years

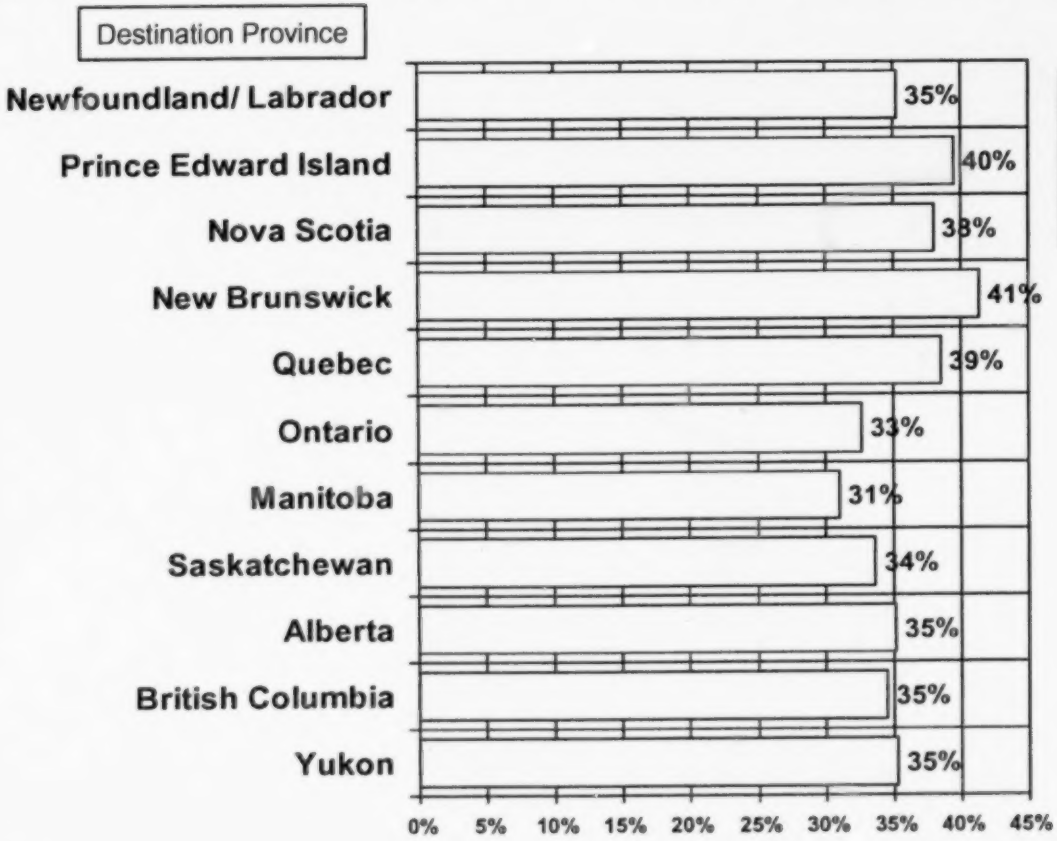


The Mature Market did not demonstrate any particular tendency to travel in Canada. Members were equally represented among those taking and those not taking trips in Canada during the past two years.

Mature Market

Percent of Canadians Taking an Overnight Pleasure Trip To Various Provinces in Last Two Years

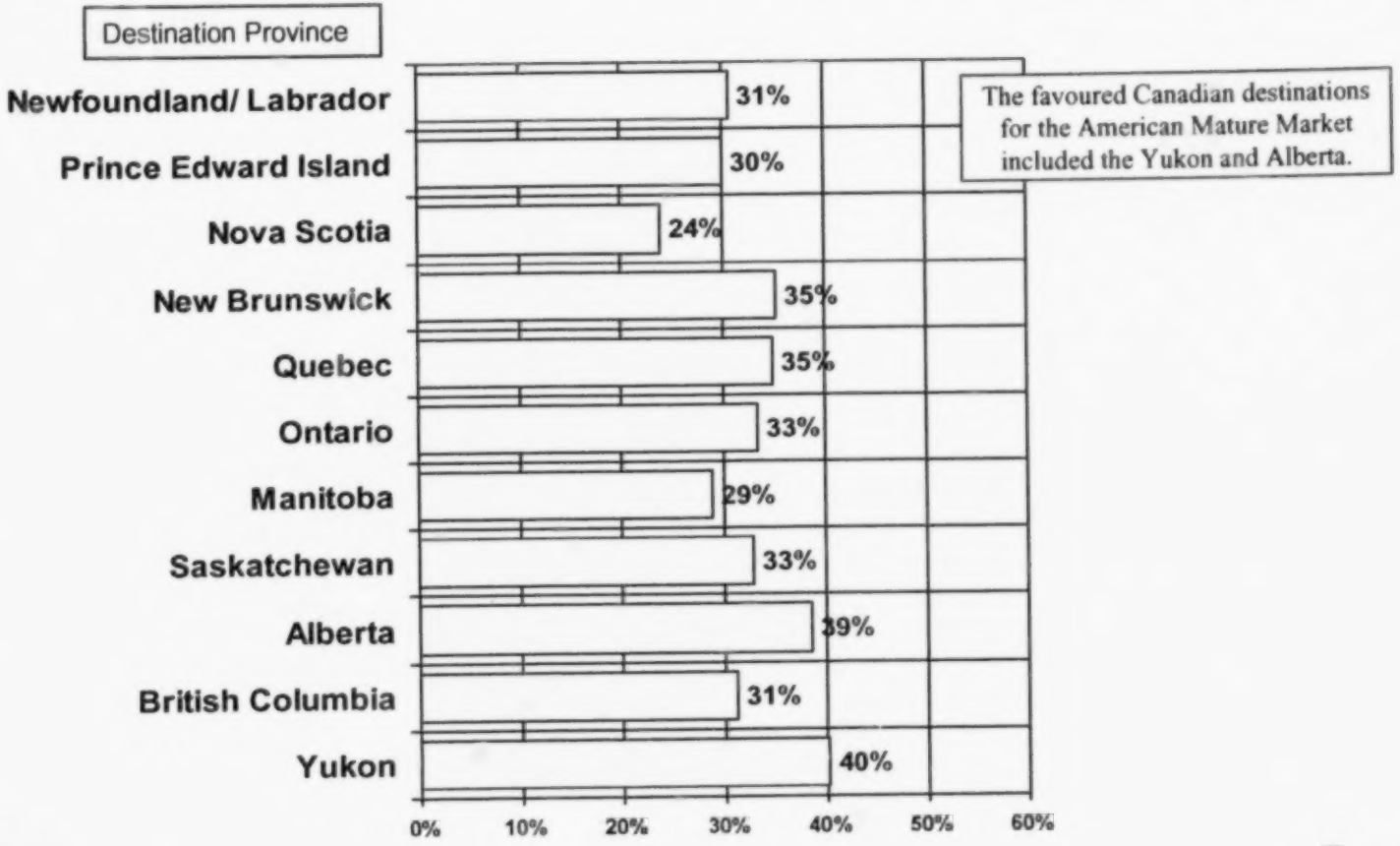
Base: Adult (18-Plus) Canadian Population Who Took an Overnight Trip Within Canada in the Last Two Years



Members of the Mature Market were more likely to visit New Brunswick, Prince Edward Island, Quebec and Nova Scotia than other parts of Canada.

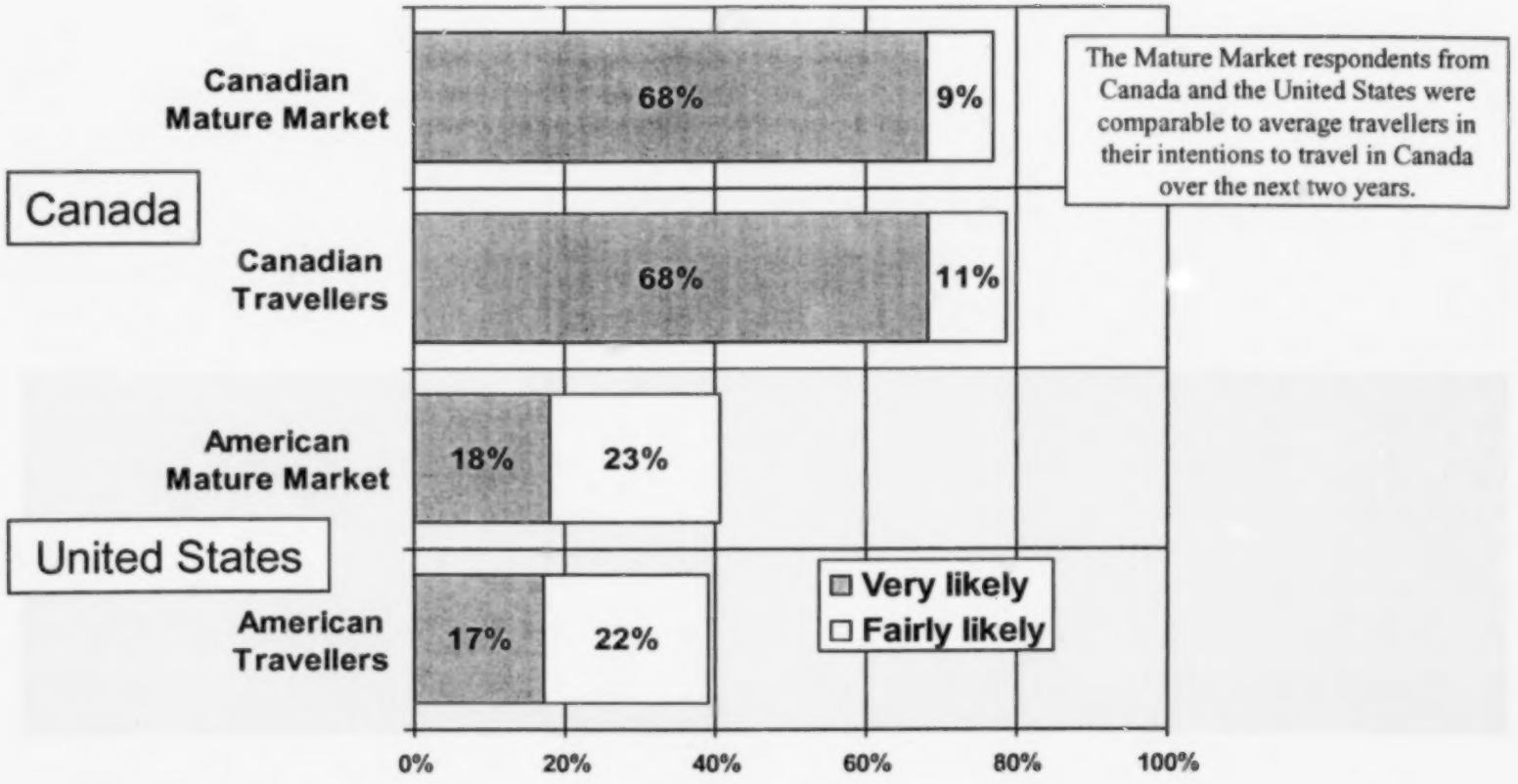
Percent of Americans Taking an Overnight Pleasure Trip To Various Provinces in Last Two Years

Base: Adult (18-Plus) American Population Who Took an Overnight Trip to Canada in the Last Two Years



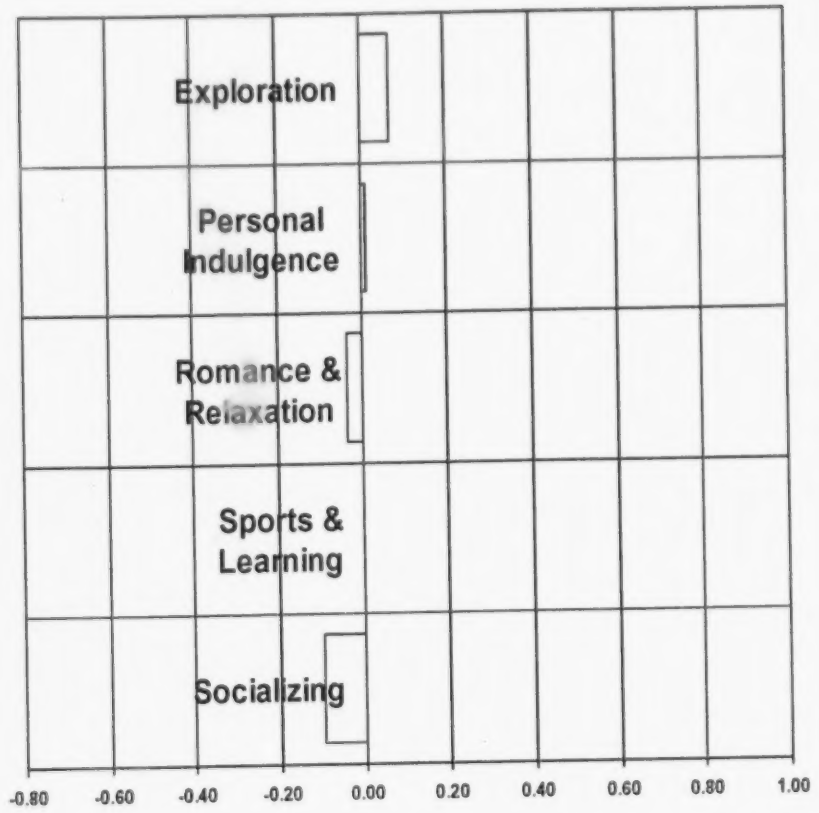
Mature Market
Intentions to Travel Within/To Canada Next Two Years

Base: Adult Population (18-Plus) Who Took an Overnight Trip in Last Two Years



Mature Market
General Vacation Experiences Sought During Pleasure Travel in the Last Two Years

Base: Total Population (18-Plus) Who Took an Overnight Trip in Last Two Years: Canada and United States (Mailback Survey)



The Mature Market respondents were slightly more likely to have sought out exploratory vacation experiences than average travellers over the last two years. They were slightly less likely to have socialised with family and friends during the past two years of travel.

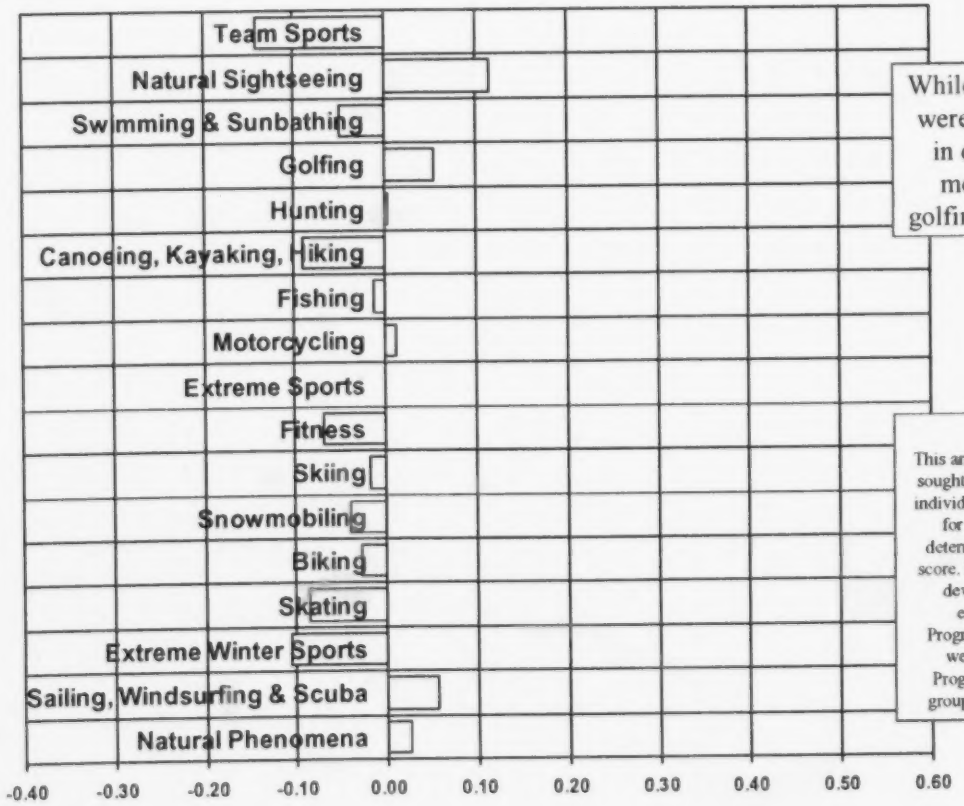
Technical Note

This analysis was based on a factor analysis of the vacation experiences sought during the past two years. See Appendix Three for a description of the individual items associated with each of these factor scores. The factor scores for each dimension were determined by the weighted sum of all items. The weight for each item was determined by how much the item correlated with the overall factor score. Factor scores were standardised with an average of "0" and a standard deviation of "1". A value of "0" means that the travellers in the group exhibited an average tendency to pursue a given vacation experience. Progressively more positive values indicate that the travellers in the group were progressively more likely to have pursued the vacation experience. Progressively more negative values indicate that the travellers within the group were progressively less likely to have pursued the vacation experience.

Mature Market

Outdoor Activities Sought During Pleasure Travel in the Last Two Years

Base: Total Population (18-Plus) Who Took an Overnight Trip in Last Two Years: Canada and United States (Mailback Survey)



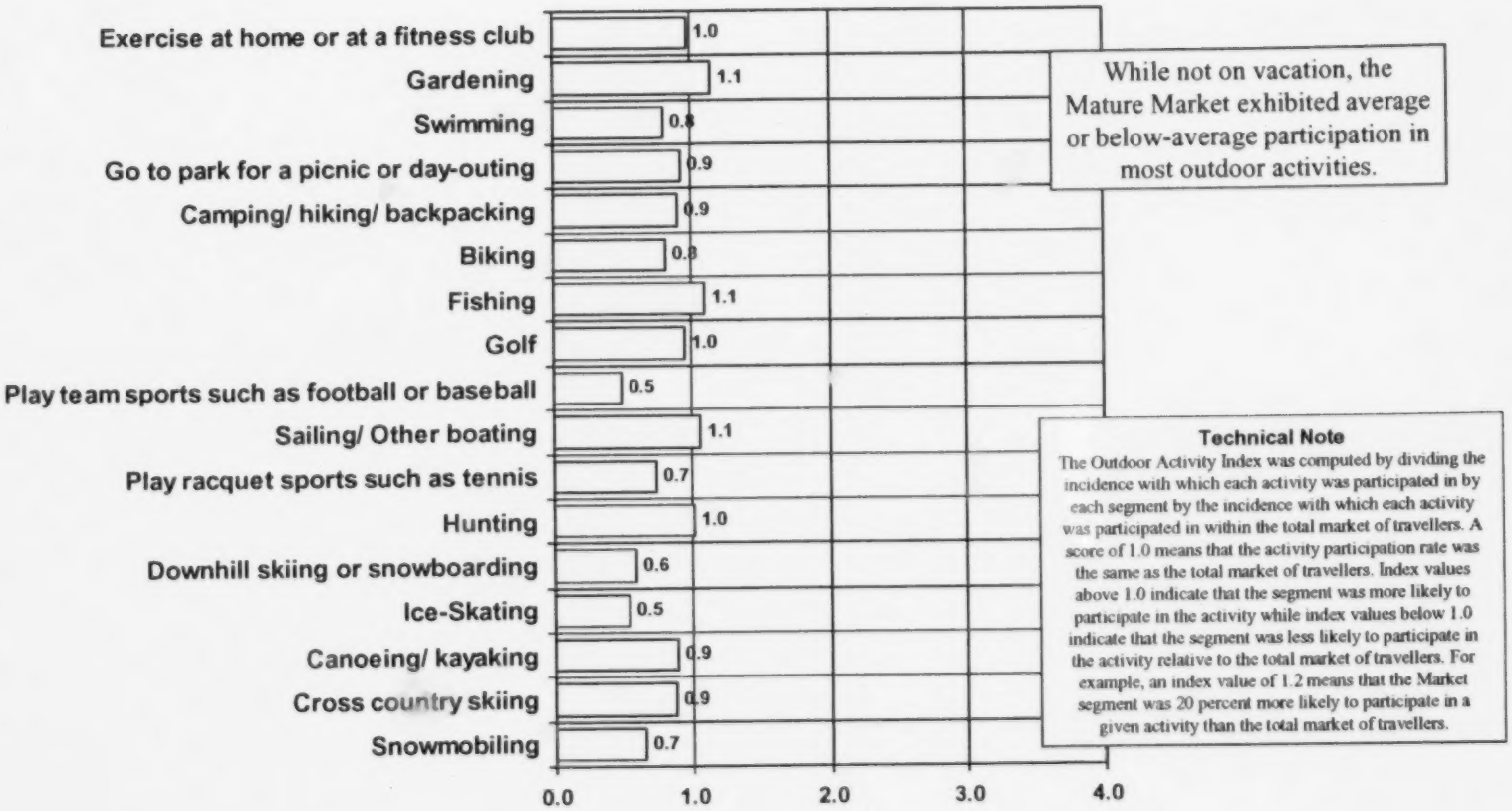
While on vacation, the Mature Market respondents were generally less active than average travellers in outdoor activities. However, members were more likely to have gone natural sightseeing, golfing, and sailing, windsurfing and scuba diving.

Technical Note

This analysis was based on a factor analysis of the outdoor vacation activities sought during the past two years. See Appendix Four for a description of the individual items associated with each of these factor scores. The factor scores for each dimension were determined by the weighted sum of all items determined by how much any given item correlated with the overall factor score. Factor scores were standardised with an average of "0" and a standard deviation of "1". A value of "0" means that the travellers in the group exhibited an average tendency to pursue a given vacation activity. Progressively more positive values indicate that the travellers in the group were progressively more likely to have pursued the vacation activity. Progressively more negative values indicate that the travellers within the group were progressively less likely to have pursued the vacation activity.

Mature Market
Outdoor Activities Sought While Not Travelling (Indexed)

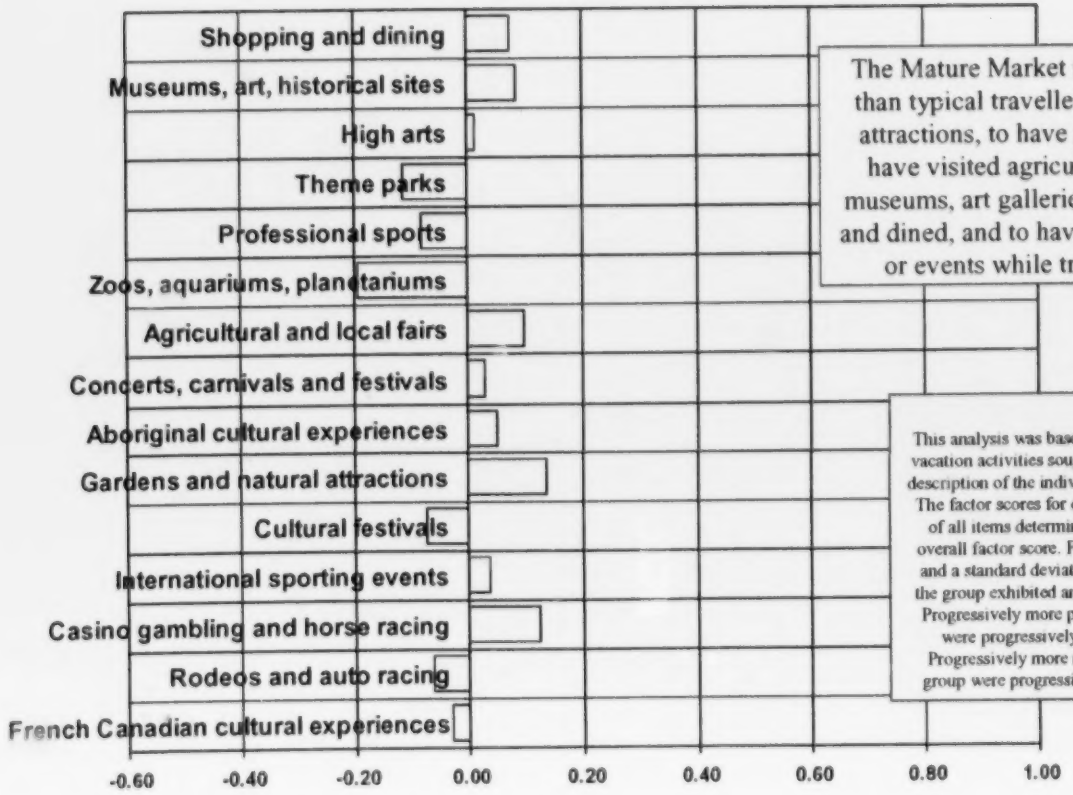
Base: Total Population (18-Plus) Who Took an Overnight Trip in Last Two Years.
Canada and United States (Mailback Survey)



Mature Market

Culture and Entertainment Activities Sought During Pleasure Travel in the Last Two Years

Base: Total Population (18-Plus) Who Took an Overnight Trip in Last Two Years: Canada and United States (Mailback Survey)



The Mature Market respondents were slightly more likely than typical travellers to have visited gardens and natural attractions, to have gambled at casinos or horse races, to have visited agricultural and local fairs, to have visited museums, art galleries and historical sites, to have shopped and dined, and to have visited aboriginal cultural attractions or events while travelling during the past two years.

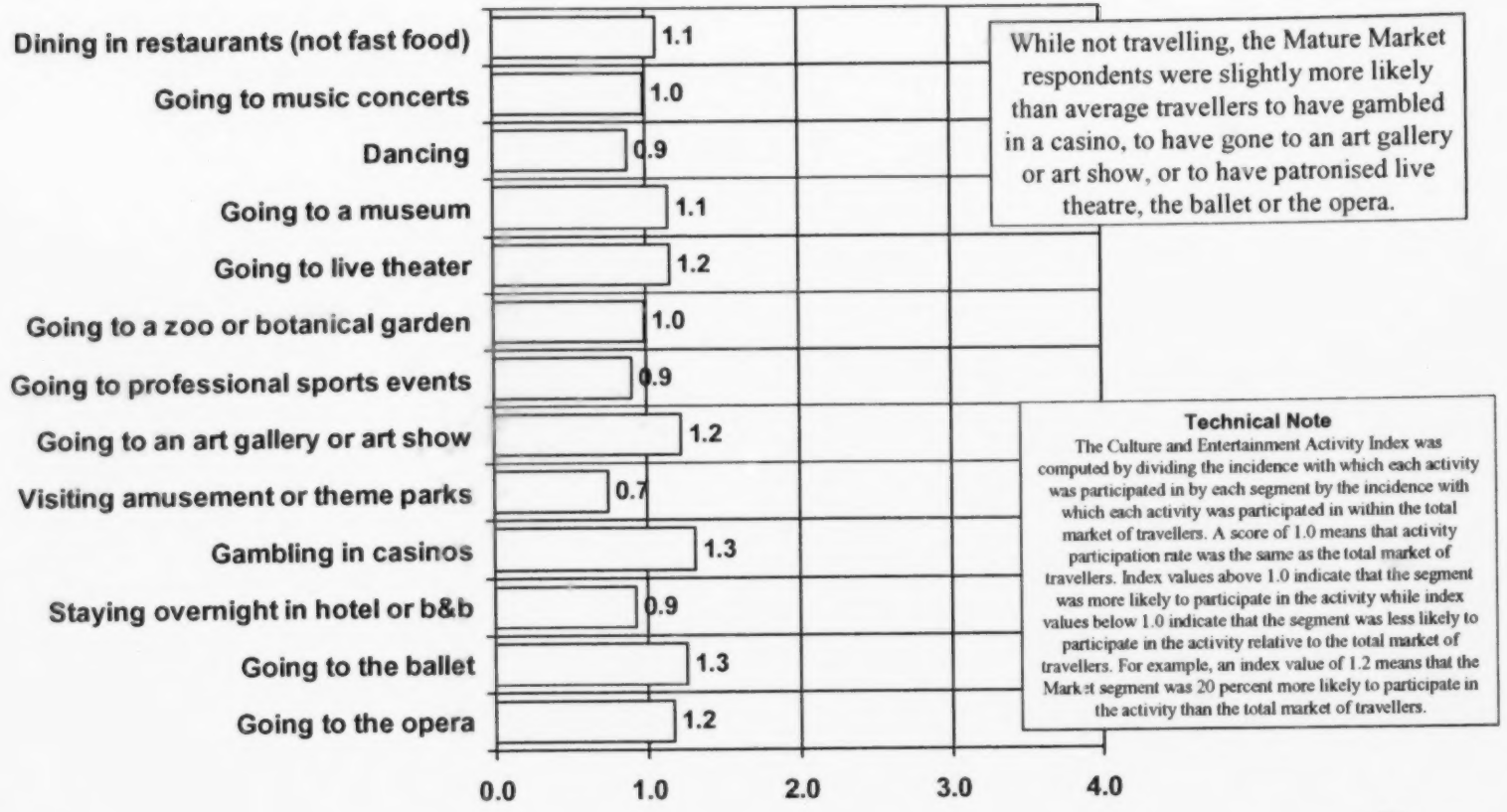
Technical Note

This analysis was based on a factor analysis of the culture and entertainment vacation activities sought during the past two years. *See Appendix Five for a* description of the individual items associated with each of these factor scores. The factor scores for each dimension were determined by the weighted sum of all items determined by how much any given item correlated with the overall factor score. Factor scores were standardised with an average of "0" and a standard deviation of "1". A value of "0" means that the travellers in the group exhibited an average tendency to pursue a given vacation activity. Progressively more positive values indicate that the travellers in the group were progressively more likely to have pursued the vacation activity. Progressively more negative values indicate that the travellers within the group were progressively less likely to have pursued the vacation activity.

Mature Market

Culture and Entertainment Activities Sought While Not Travelling (Indexed)

Base: Total Population (18-Plus) Who Took an Overnight Trip in Last Two Years: Canada and United States (Mailback Survey)



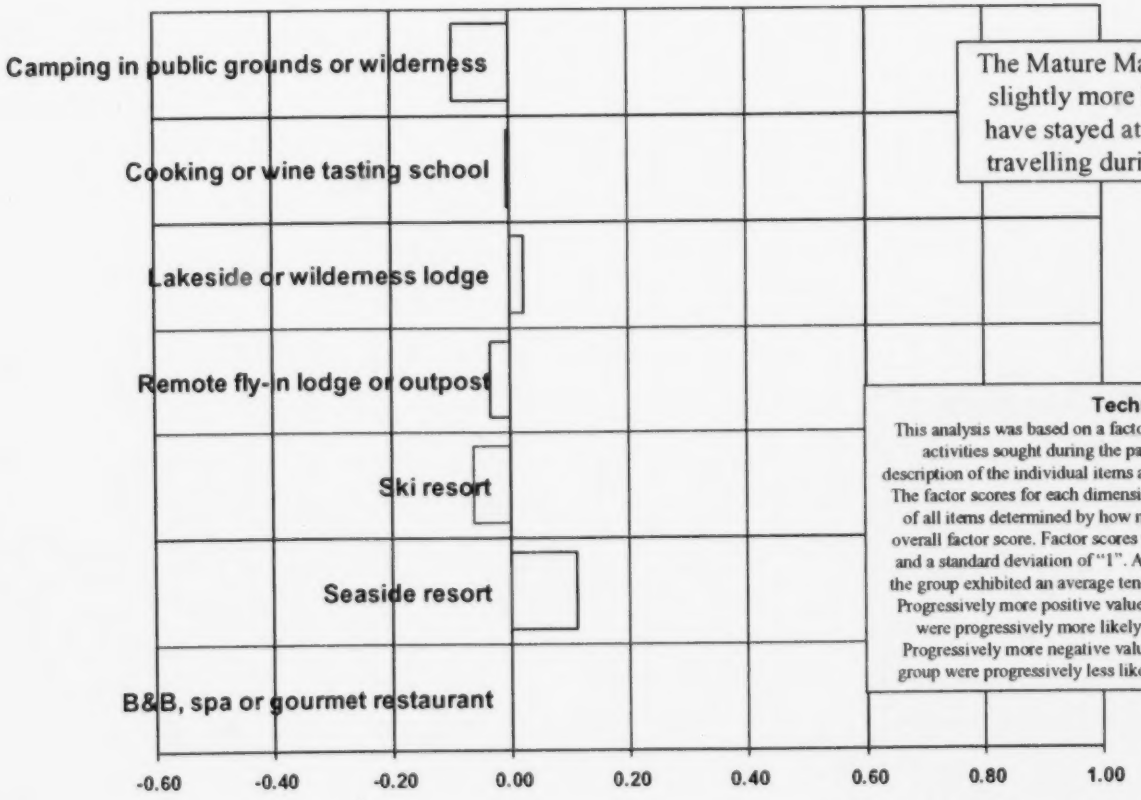
While not travelling, the Mature Market respondents were slightly more likely than average travellers to have gambled in a casino, to have gone to an art gallery or art show, or to have patronised live theatre, the ballet or the opera.

Technical Note

The Culture and Entertainment Activity Index was computed by dividing the incidence with which each activity was participated in by each segment by the incidence with which each activity was participated in within the total market of travellers. A score of 1.0 means that activity participation rate was the same as the total market of travellers. Index values above 1.0 indicate that the segment was more likely to participate in the activity while index values below 1.0 indicate that the segment was less likely to participate in the activity relative to the total market of travellers. For example, an index value of 1.2 means that the Market segment was 20 percent more likely to participate in the activity than the total market of travellers.

Mature Market
Accommodation-Related Activities Sought During Pleasure Travel in the Last Two Years

Base: Total Population (18-Plus) Who Took an Overnight Trip in Last Two Years: Canada and United States (Mailback Survey)



The Mature Market respondents were slightly more likely than average to have stayed at a seaside resort while travelling during the past two years.

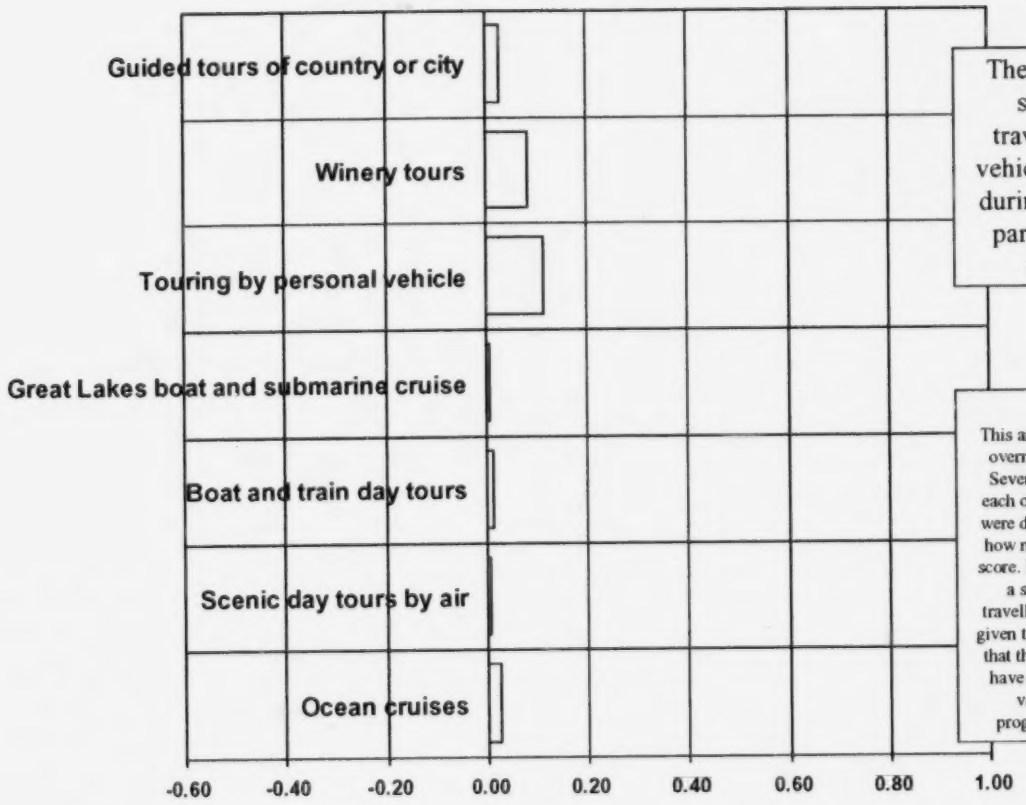
Technical Note

This analysis was based on a factor analysis of the accommodation-related activities sought during the past two years. See Appendix Six for a description of the individual items associated with each of these factor scores. The factor scores for each dimension were determined by the weighted sum of all items determined by how much any given item correlated with the overall factor score. Factor scores were standardised with an average of "0" and a standard deviation of "1". A value of "0" means that the travellers in the group exhibited an average tendency to pursue a given vacation activity. Progressively more positive values indicate that the travellers in the group were progressively more likely to have pursued the vacation activity. Progressively more negative values indicate that the travellers within the group were progressively less likely to have pursued the vacation activity.

Mature Market

Day and Overnight Touring Activities in the Last Two Years

Base: Total Population (18-Plus) Who Took an Overnight Trip in Last Two Years: Canada and United States (Mailback Survey)



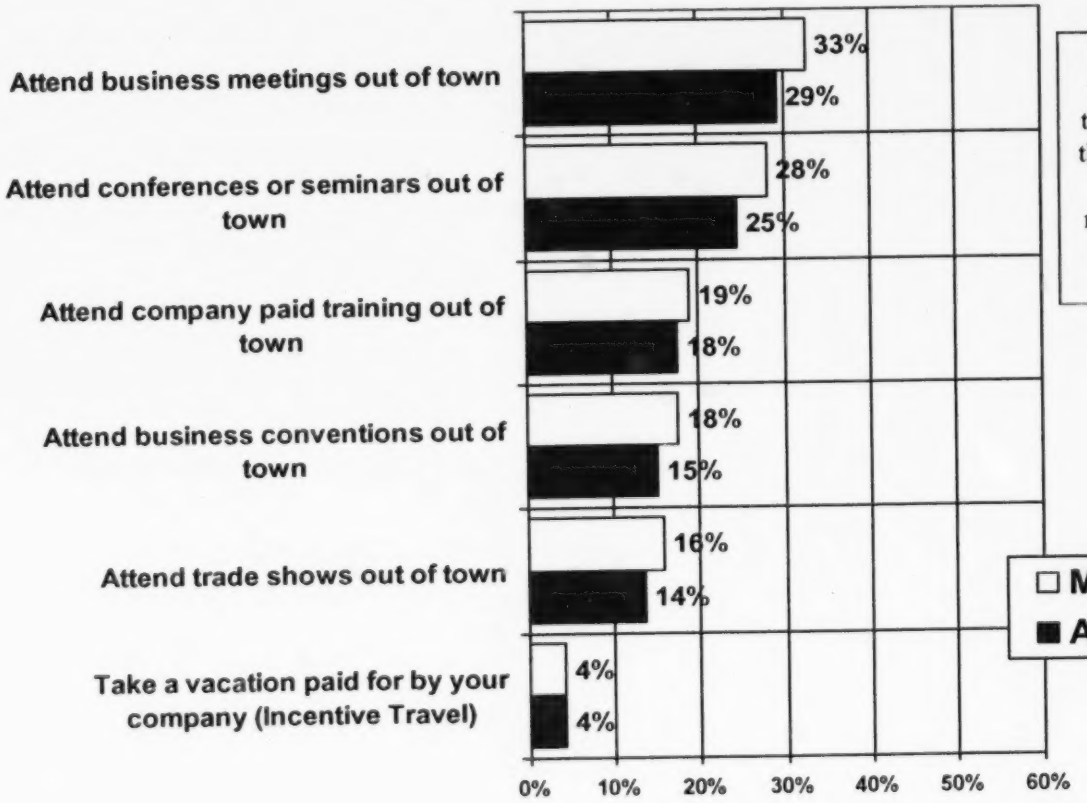
The Mature Market respondents were slightly more likely than typical travellers to have toured by personal vehicle or to have gone on winery tours during the past two years. Respondents participated in other types of touring activities to an average extent.

Technical Note

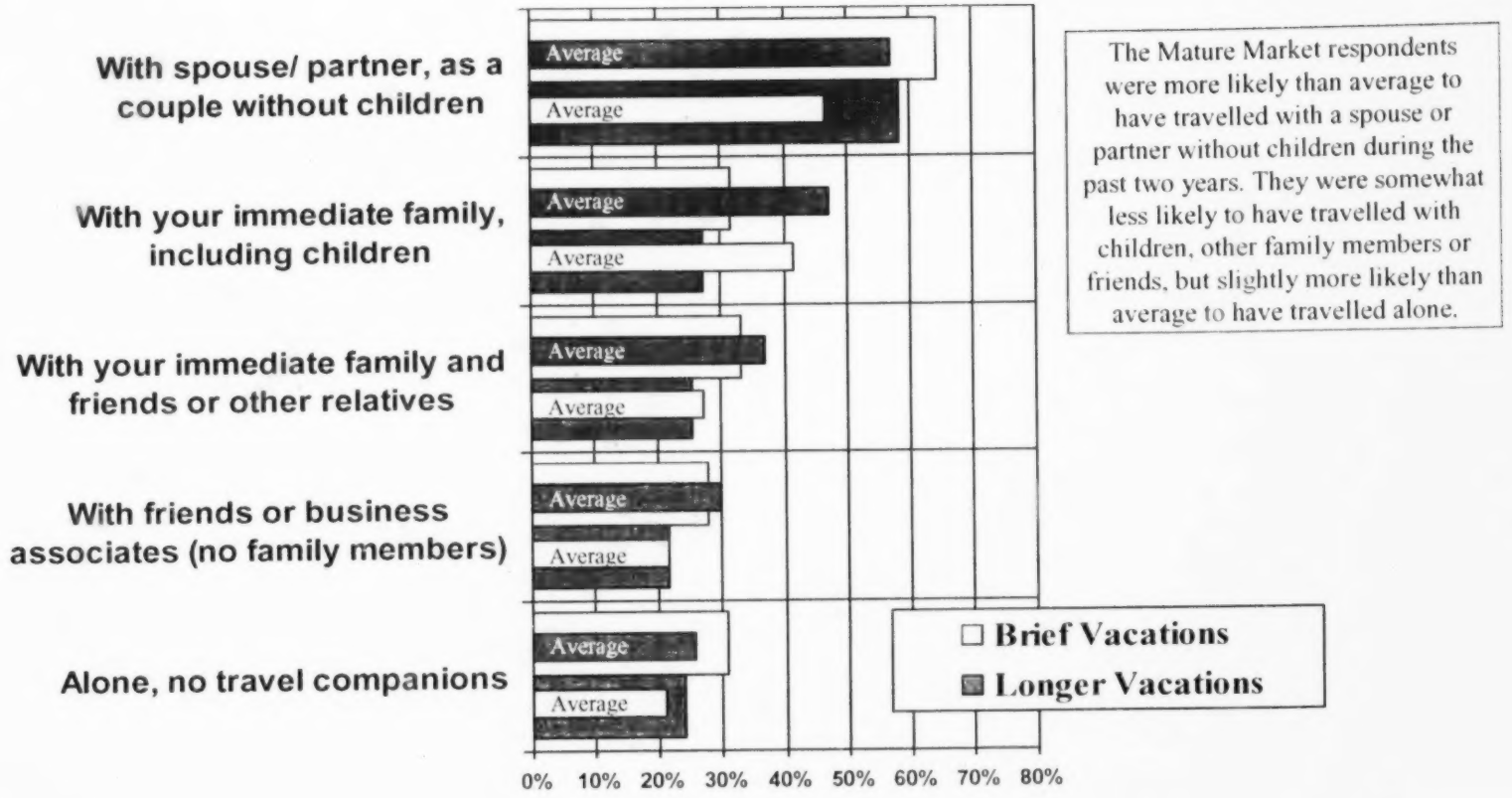
This analysis was based on a factor analysis of the same-day and overnight tours taken during the past two years. See Appendix Seven for a description of the individual items associated with each of these factor scores. The factor scores for each dimension were determined by the weighted sum of all items determined by how much any given item was correlated with the overall factor score. Factor scores were standardised with an average of "0" and a standard deviation of "1". A value of "0" means that the travellers in the group exhibited an average tendency to pursue a given touring activity. Progressively more positive values indicate that the travellers in the group were progressively more likely to have pursued the touring activity. Progressively more negative values indicate that the travellers within the group were progressively less likely to have pursued the touring activity.

Mature Market
Percent Taking Various Types Of Overnight Business Trips in Last Two Years

Base: Total Population (18-Plus) Who Took an Overnight Trip in Last Two Years: Canada and United States (Mailback Survey)



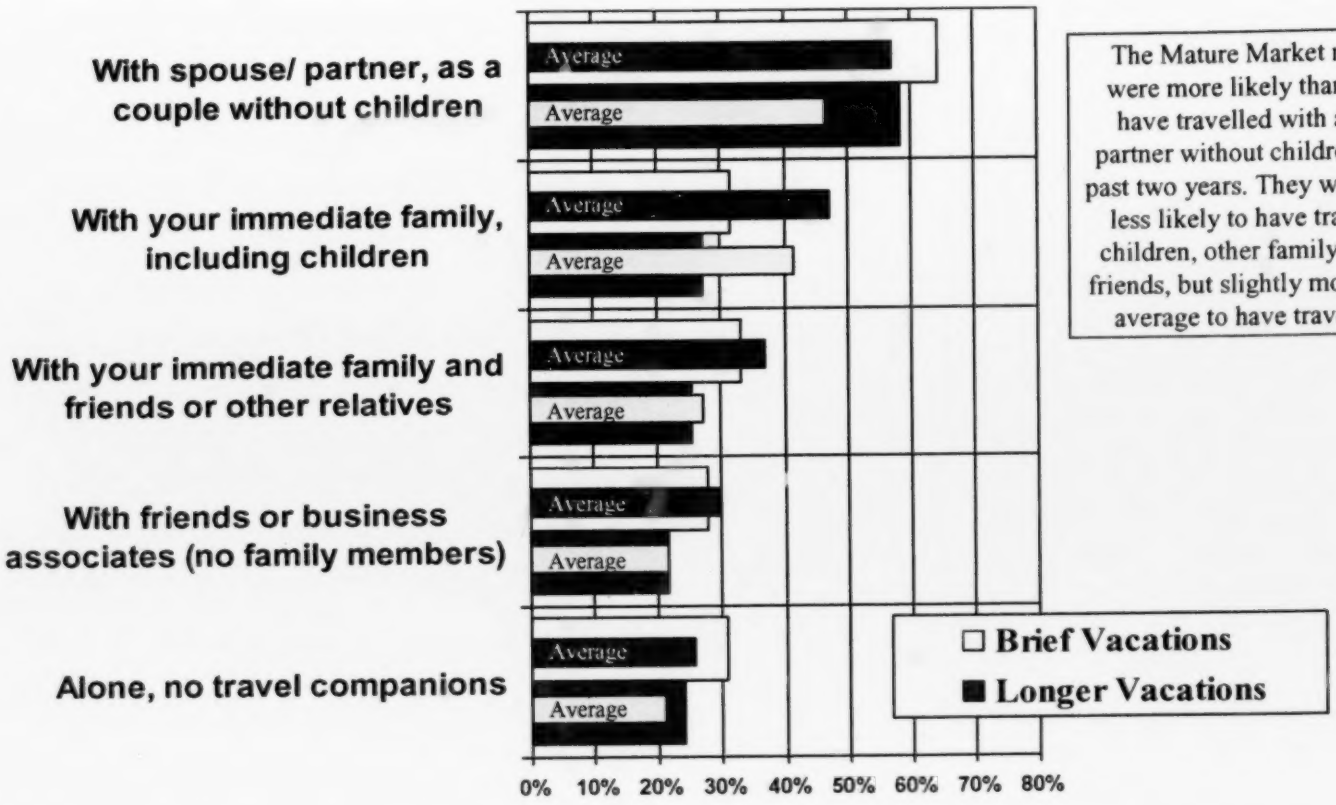
Those within the Mature Market were slightly more likely to have travelled for business reasons over the last two years. This may reflect the fact that many within this market hold more senior positions within their organizations, thus necessitating business travel.



The Mature Market respondents were more likely than average to have travelled with a spouse or partner without children during the past two years. They were somewhat less likely to have travelled with children, other family members or friends, but slightly more likely than average to have travelled alone.

Mature Market
Composition of Travel Party for Brief and Long Trips In Last Two Years

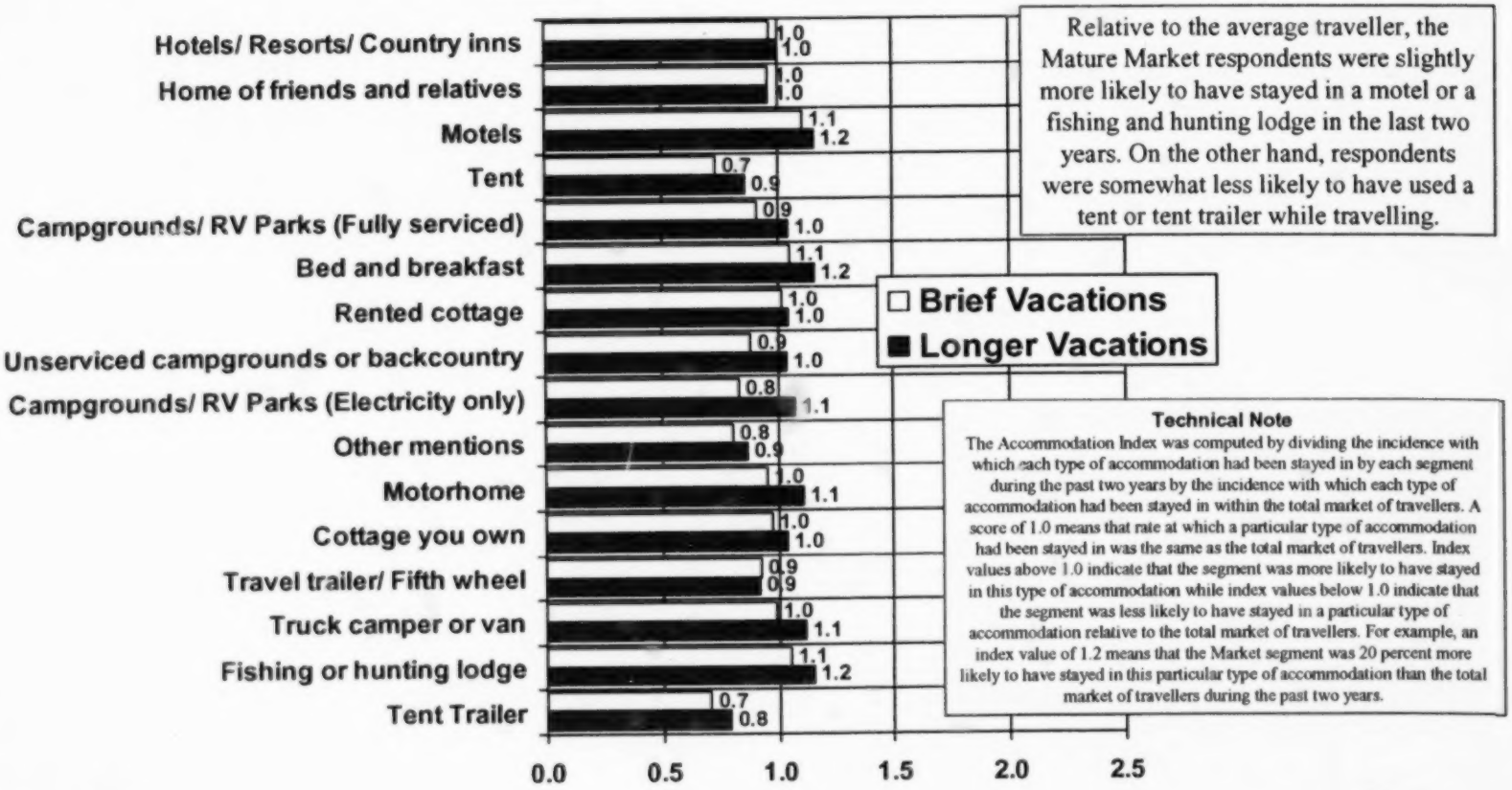
Base: Total Population (18-Plus) Who Took an Overnight Trip in Last Two Years: Canada and United States (Mailback Survey)



The Mature Market respondents were more likely than average to have travelled with a spouse or partner without children during the past two years. They were somewhat less likely to have travelled with children, other family members or friends, but slightly more likely than average to have travelled alone.

Types of Accommodations Used for Brief and Longer Trips In Last Two Years (Indexed)

Base: Total Population (18-Plus) Who Took an Overnight Trip in Last Two Years: Canada and United States (Mailback Survey)



Relative to the average traveller, the Mature Market respondents were slightly more likely to have stayed in a motel or a fishing and hunting lodge in the last two years. On the other hand, respondents were somewhat less likely to have used a tent or tent trailer while travelling.

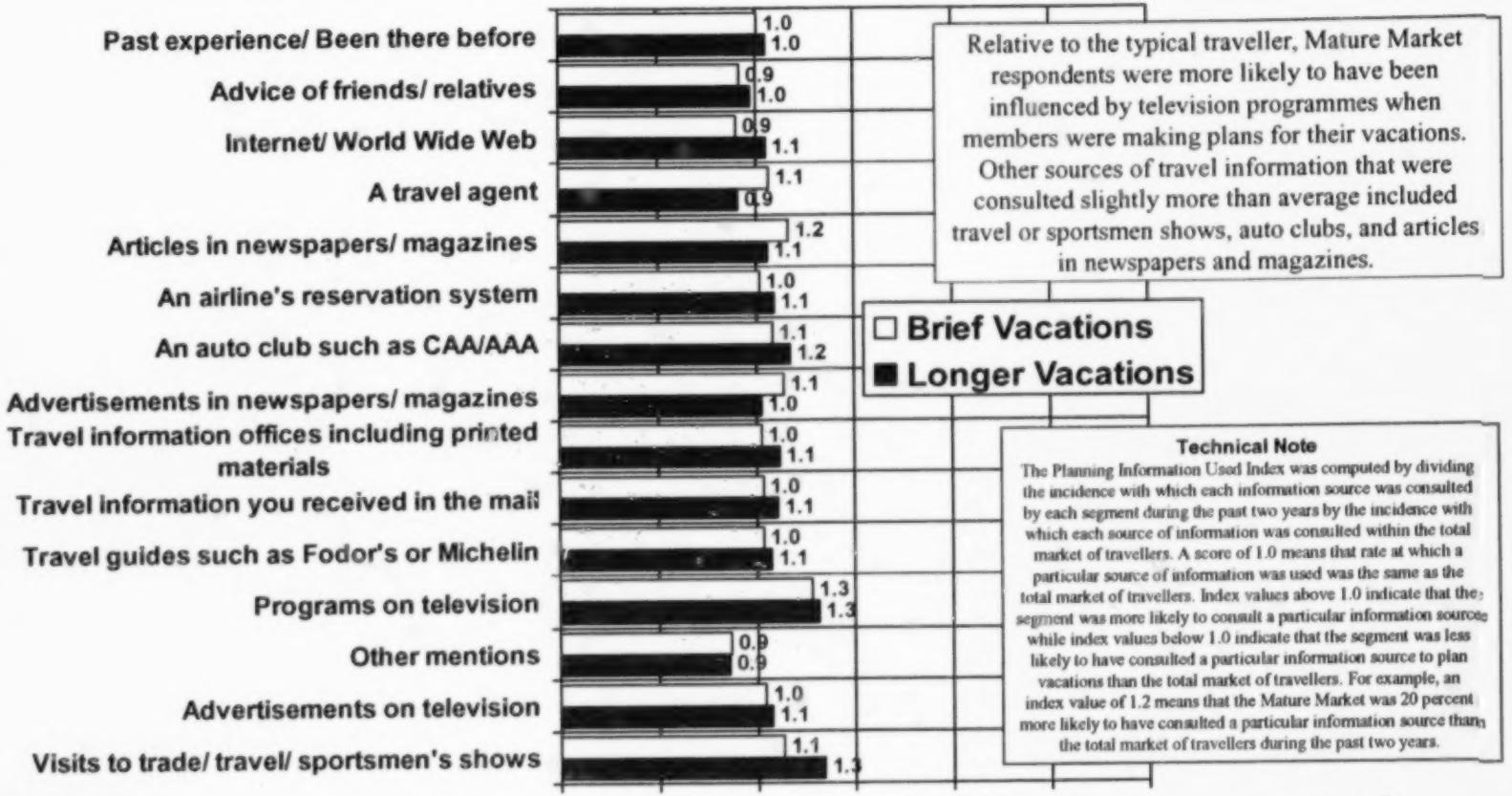
Technical Note

The Accommodation Index was computed by dividing the incidence with which each type of accommodation had been stayed in by each segment during the past two years by the incidence with which each type of accommodation had been stayed in within the total market of travellers. A score of 1.0 means that rate at which a particular type of accommodation had been stayed in was the same as the total market of travellers. Index values above 1.0 indicate that the segment was more likely to have stayed in this type of accommodation while index values below 1.0 indicate that the segment was less likely to have stayed in a particular type of accommodation relative to the total market of travellers. For example, an index value of 1.2 means that the Market segment was 20 percent more likely to have stayed in this particular type of accommodation than the total market of travellers during the past two years.

Mature Market

Information Sources Used to Plan Brief and Longer Trips In Last Two Years (Indexed)

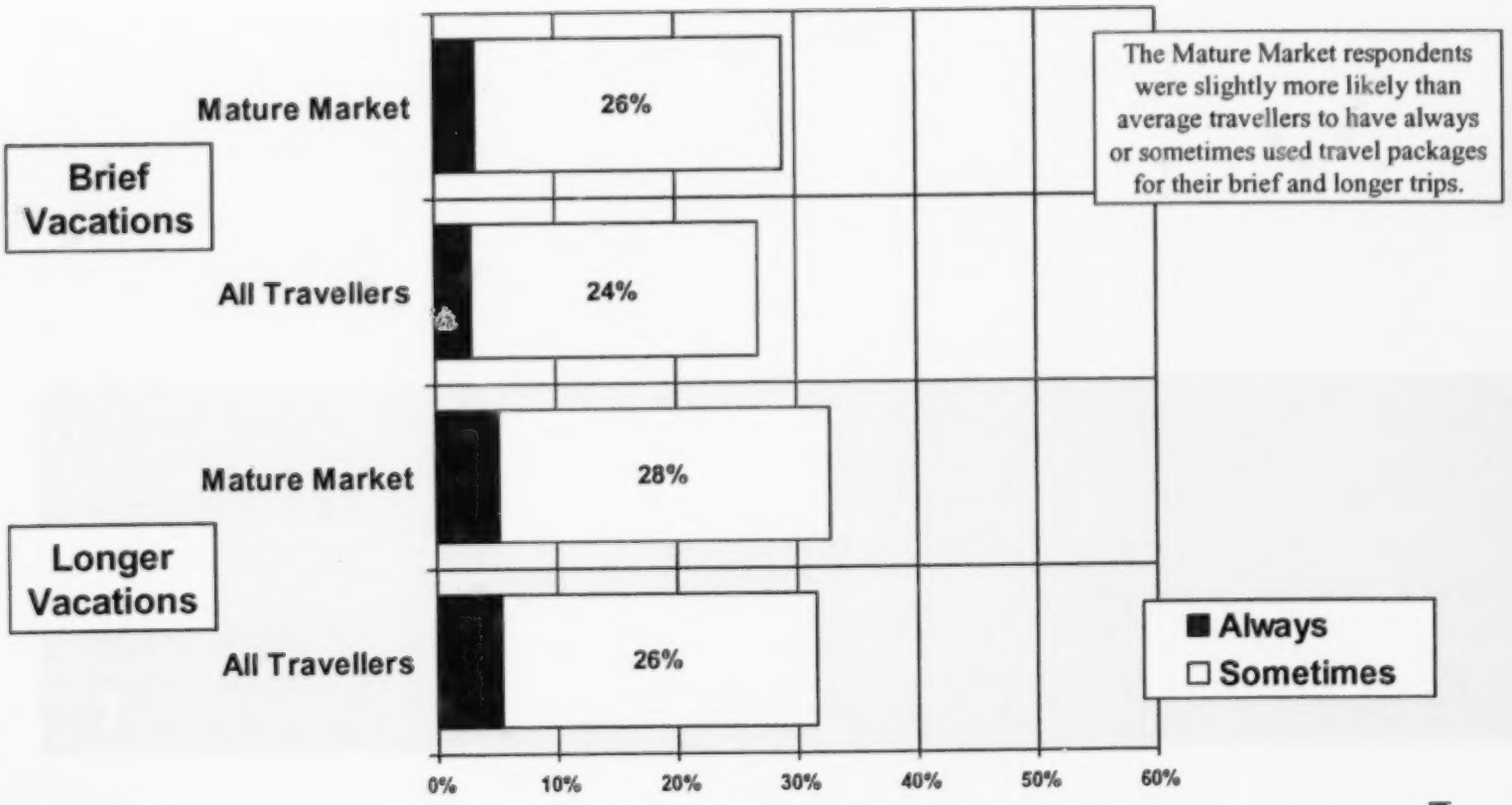
Base: Total Population (18-Plus) Who Took an Overnight Trip in Last Two Years: Canada and United States (Mailback Survey)

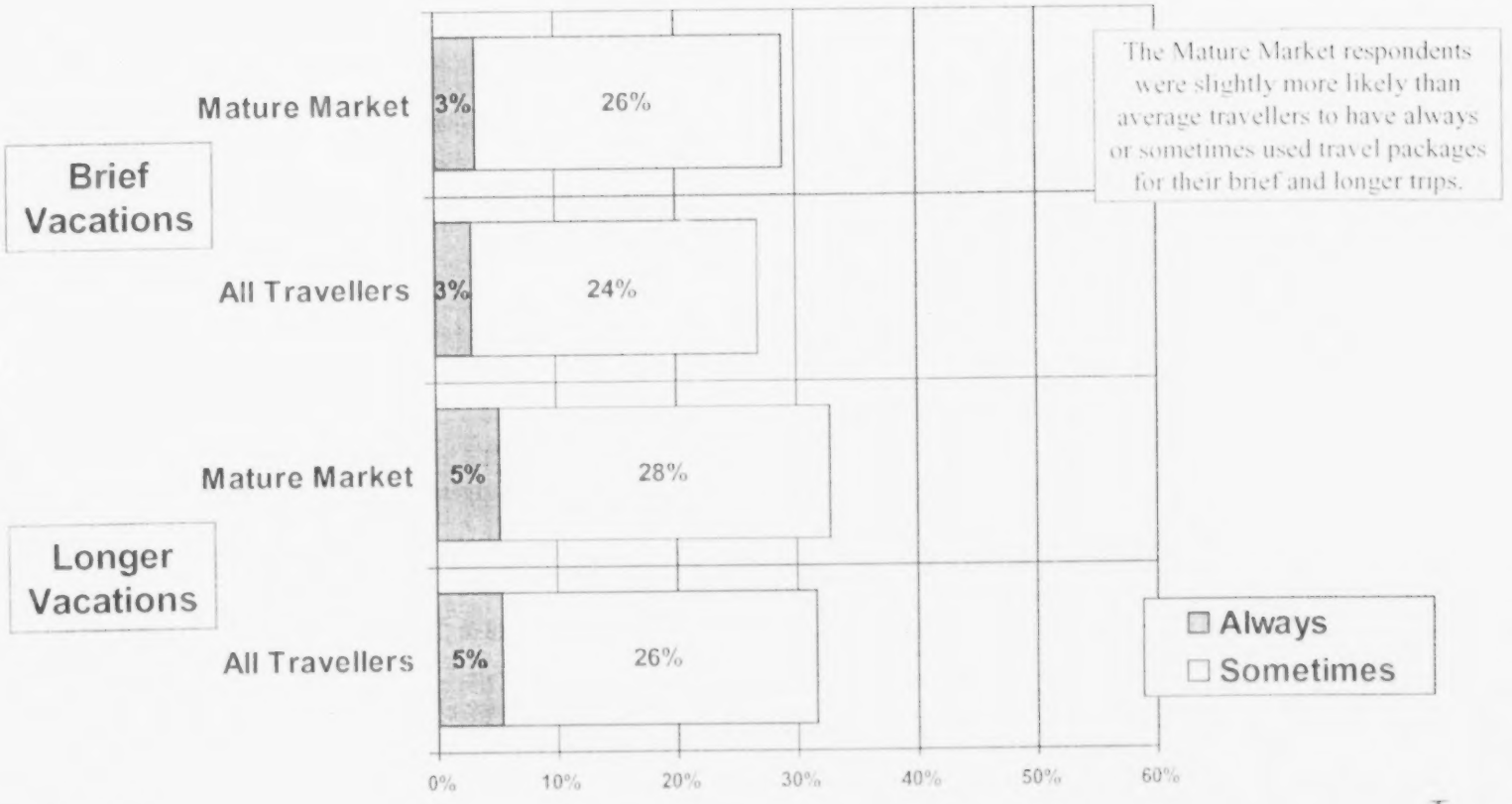


Mature Market

How Often Travel Packages Used For Brief and Longer Vacations in Last Two Years

Base: Total Population (18-Plus) Who Took an Overnight Trip in Last Two Years: Canada and United States (Mailback Survey)

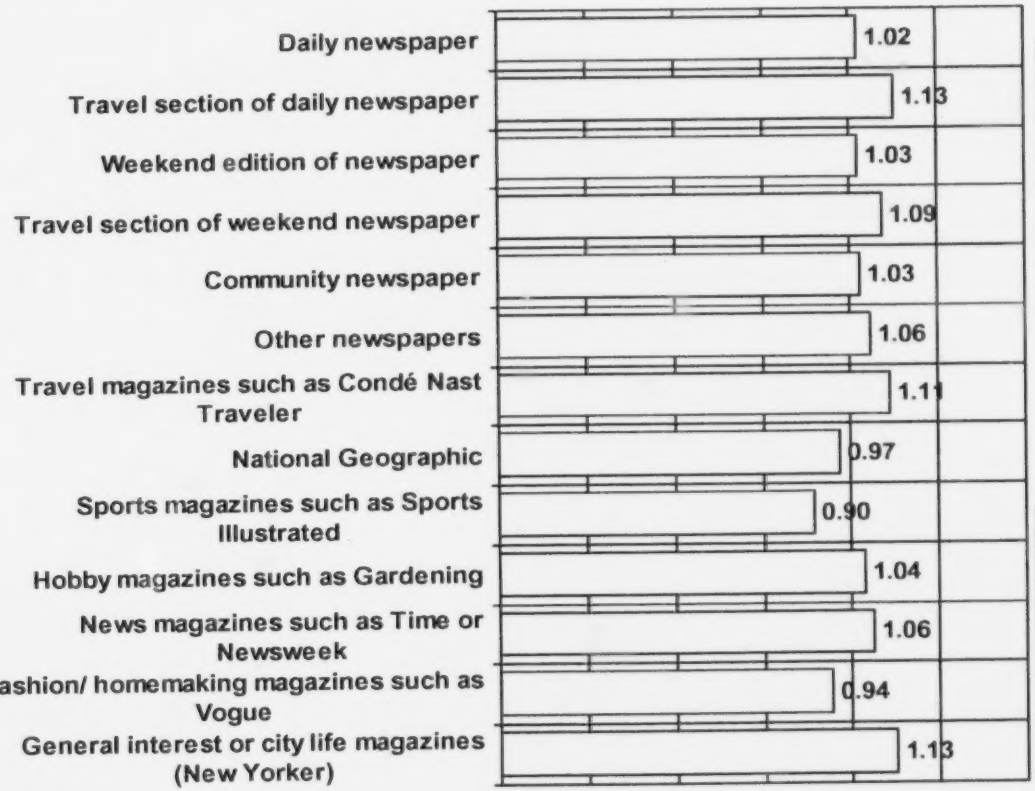



Mature Market
3%
26%
Brief Vacations
All Travellers
3%
24%
Mature Market
5%
28%
Longer Vacations
All Travellers
5%
26%
0%
10%
20%
30%
40%
50%
60%
Always
Sometimes
The Mature Market respondents were slightly more likely than average travellers to have always or sometimes used travel packages for their brief and longer trips.

Mature Market Media Index for Print Media: Canada and U.S.

Percent Reading Each Publication Type in Segment By Percent Reading Each Publication Type Among Travellers

Base: Total Population (18-Plus) Who Took an Overnight Trip in Last Two Years
Canada and United States (Mailback Survey)



Media indexing for various types of print media (see Technical Note below) indicates that the Mature Market can be reached most effectively through specialised travel publications (travel section of daily and weekend newspapers, travel magazines), and general interest or city life magazines.

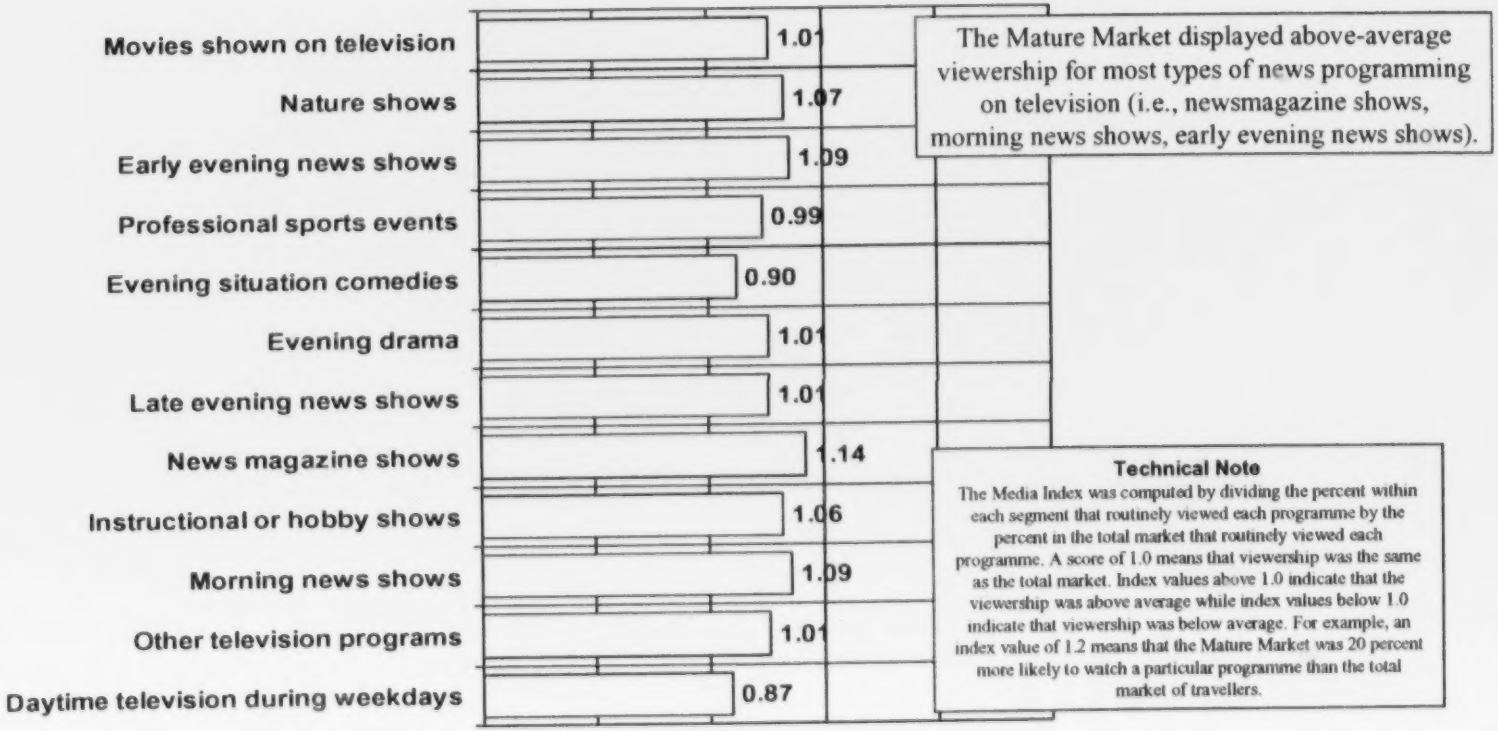
Technical Note

The Media Index was computed by dividing the percent within each segment that routinely read each publication by the percent in the total market that routinely read each publication. A score of 1.0 means that readership was the same as the total market. Index values above 1.0 indicate that the readership was above average while index values below 1.0 indicate that readership was below average. For example, an index value of 1.2 means that the Mature Market was 20 percent more likely to read a particular publication than the total market of travellers.

Mature Market Media Index for Television: Canada and U.S.

Percent Watching Each Type of Programme in Segment By Percent Watching Each Type of Programme Among Travellers

Base: Total Population (18-Plus) Who Took an Overnight Trip in Last Two Years: Canada and United States (Mailback Survey)



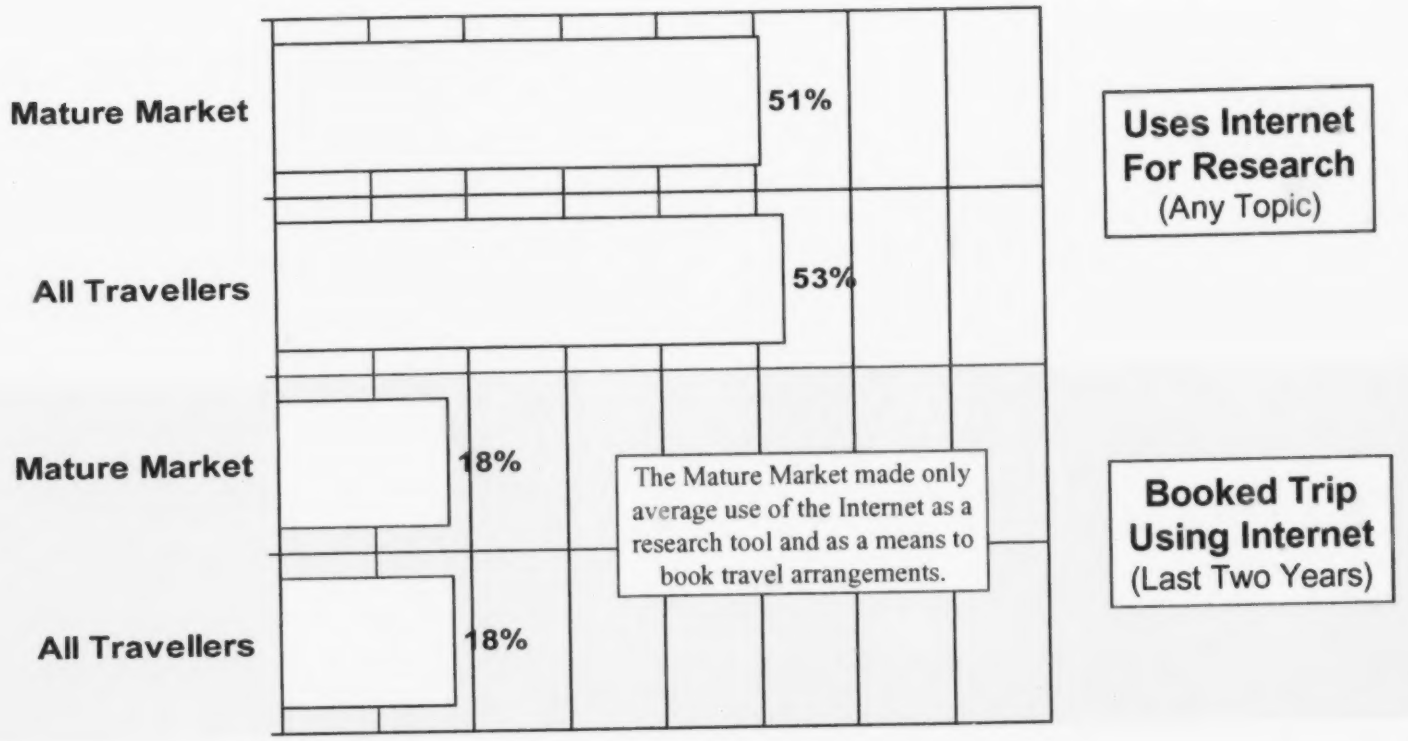
The Mature Market displayed above-average viewership for most types of news programming on television (i.e., newsmagazine shows, morning news shows, early evening news shows).

Technical Note

The Media Index was computed by dividing the percent within each segment that routinely viewed each programme by the percent in the total market that routinely viewed each programme. A score of 1.0 means that viewership was the same as the total market. Index values above 1.0 indicate that the viewership was above average while index values below 1.0 indicate that viewership was below average. For example, an index value of 1.2 means that the Mature Market was 20 percent more likely to watch a particular programme than the total market of travellers.

Mature Market
Percent Using Internet and Booking at Least One Trip Using the Internet

Base: Total Population (18-Plus) Who Took an Overnight Trip in Last Two Years
Canada and United States (Mailback Survey)

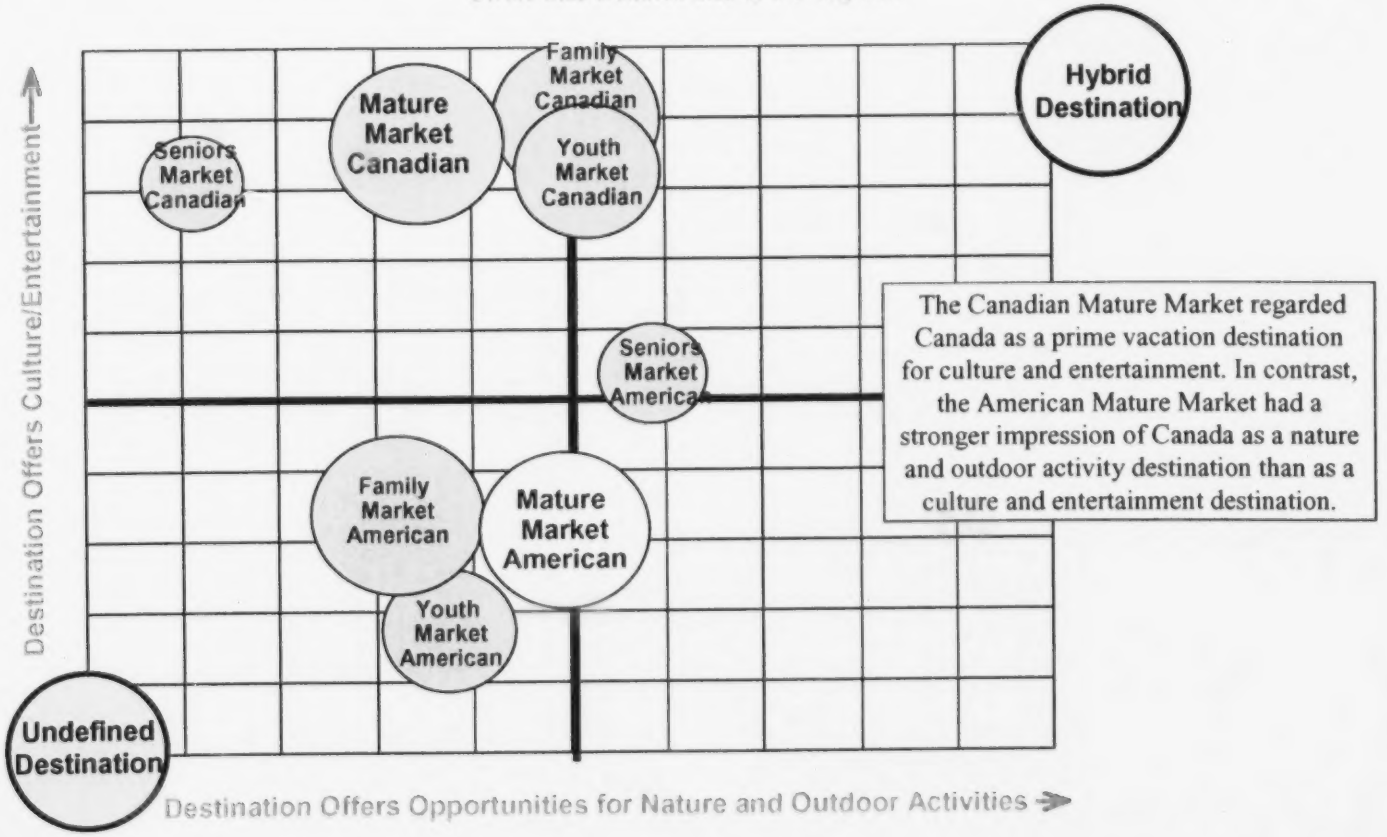


Mature Market

Vacation Image of Canada

Base: Total Population (18-Plus) Who Took an Overnight Trip in Last Two Years and Were Able to Rate Canada On One-Plus Attributes, Canada and United States (Mailback Survey)

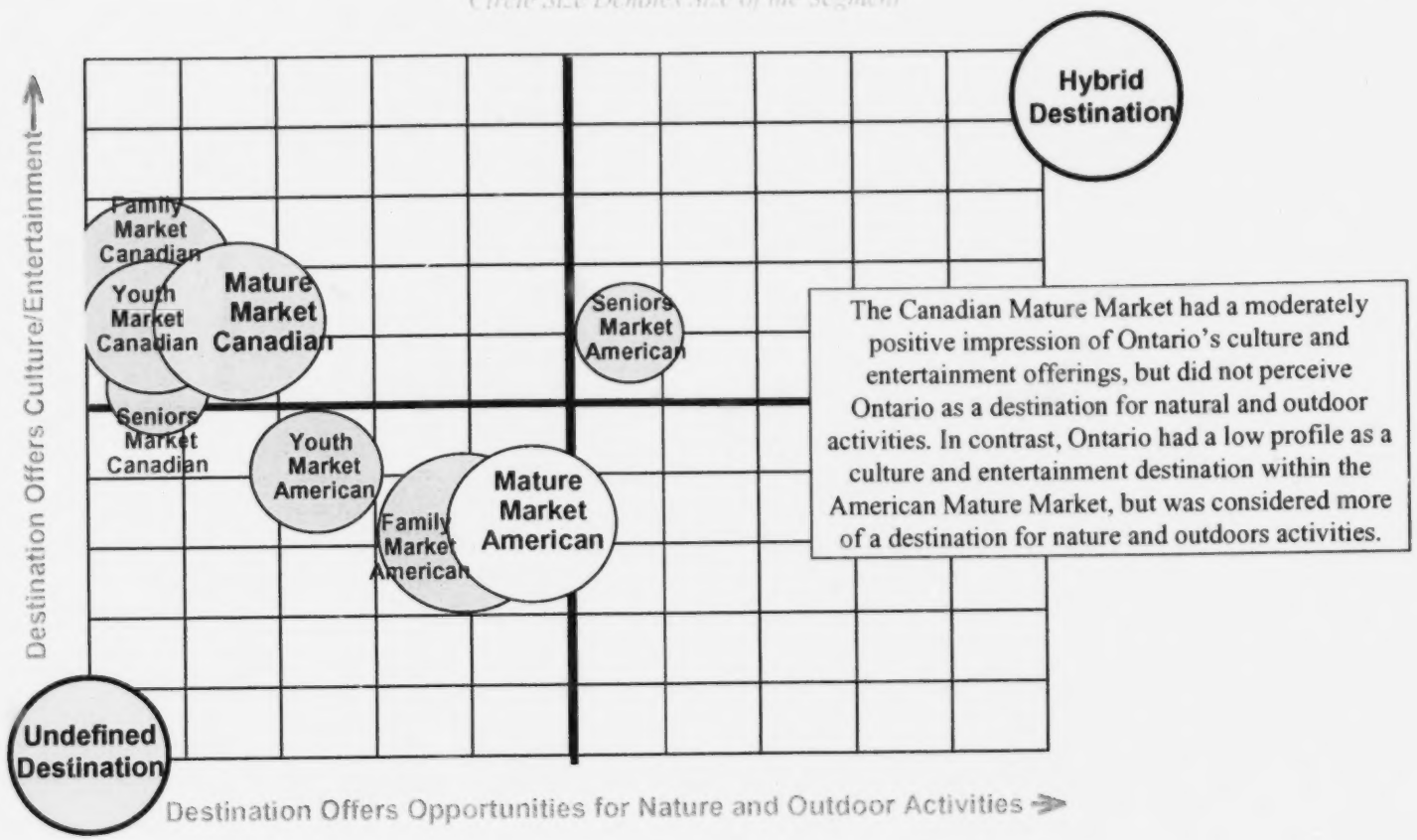
Circle Size Denotes Size of the Segment



Mature Market
Vacation Image of Ontario

Base: Total Population (18-Plus) Who Took an Overnight Trip in Last Two Years and Were Able to Rate Canada On One-Plus Attributes, Canada and United States (Mailback Survey)

Circle Size Denotes Size of the Segment

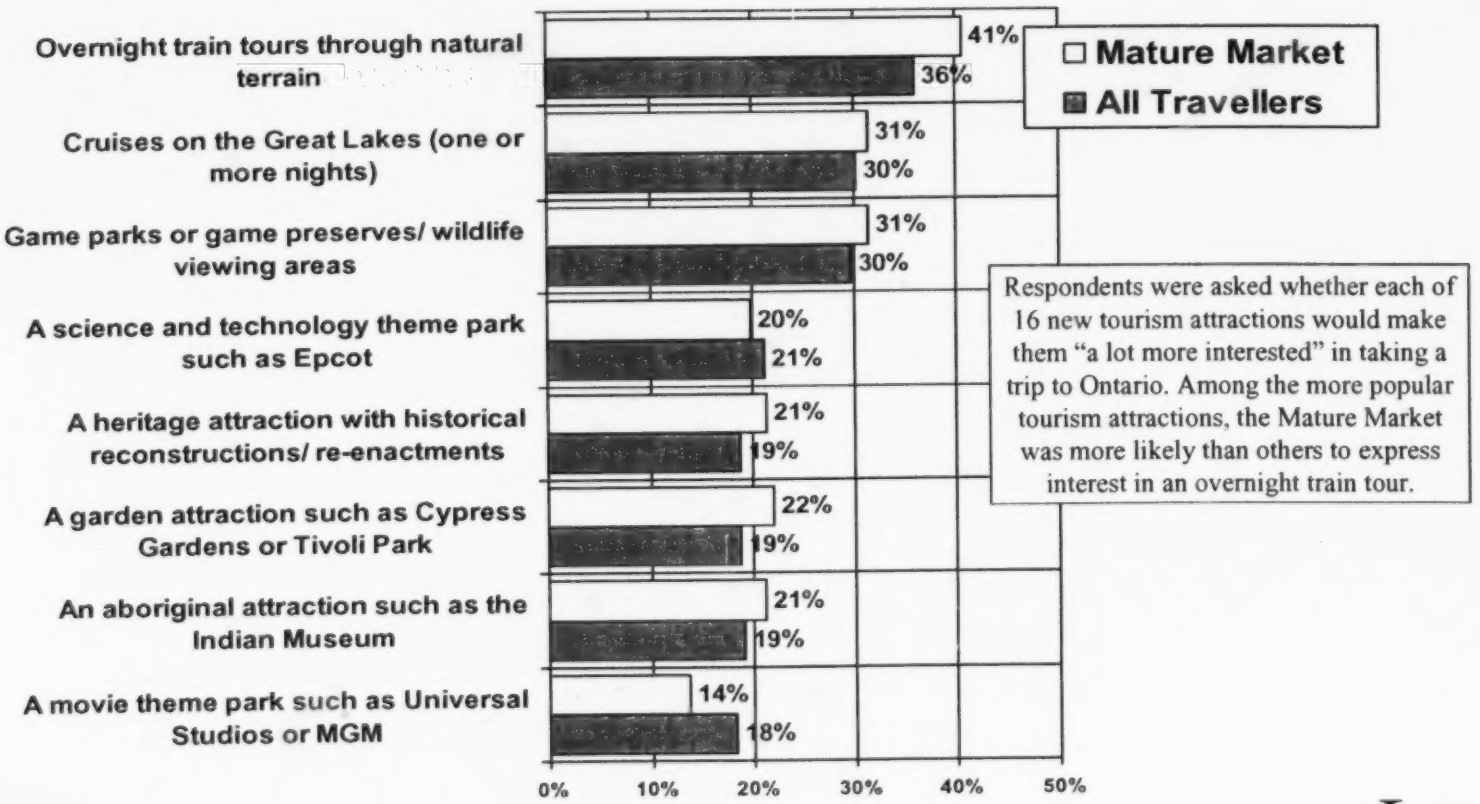


The Canadian Mature Market had a moderately positive impression of Ontario's culture and entertainment offerings, but did not perceive Ontario as a destination for natural and outdoor activities. In contrast, Ontario had a low profile as a culture and entertainment destination within the American Mature Market, but was considered more of a destination for nature and outdoors activities.

Mature Market Interest in New Tourism Products (Part One of Two)

Percent Stating Attraction Would Make Them "A Lot More Interested" in Taking a Trip to Ontario

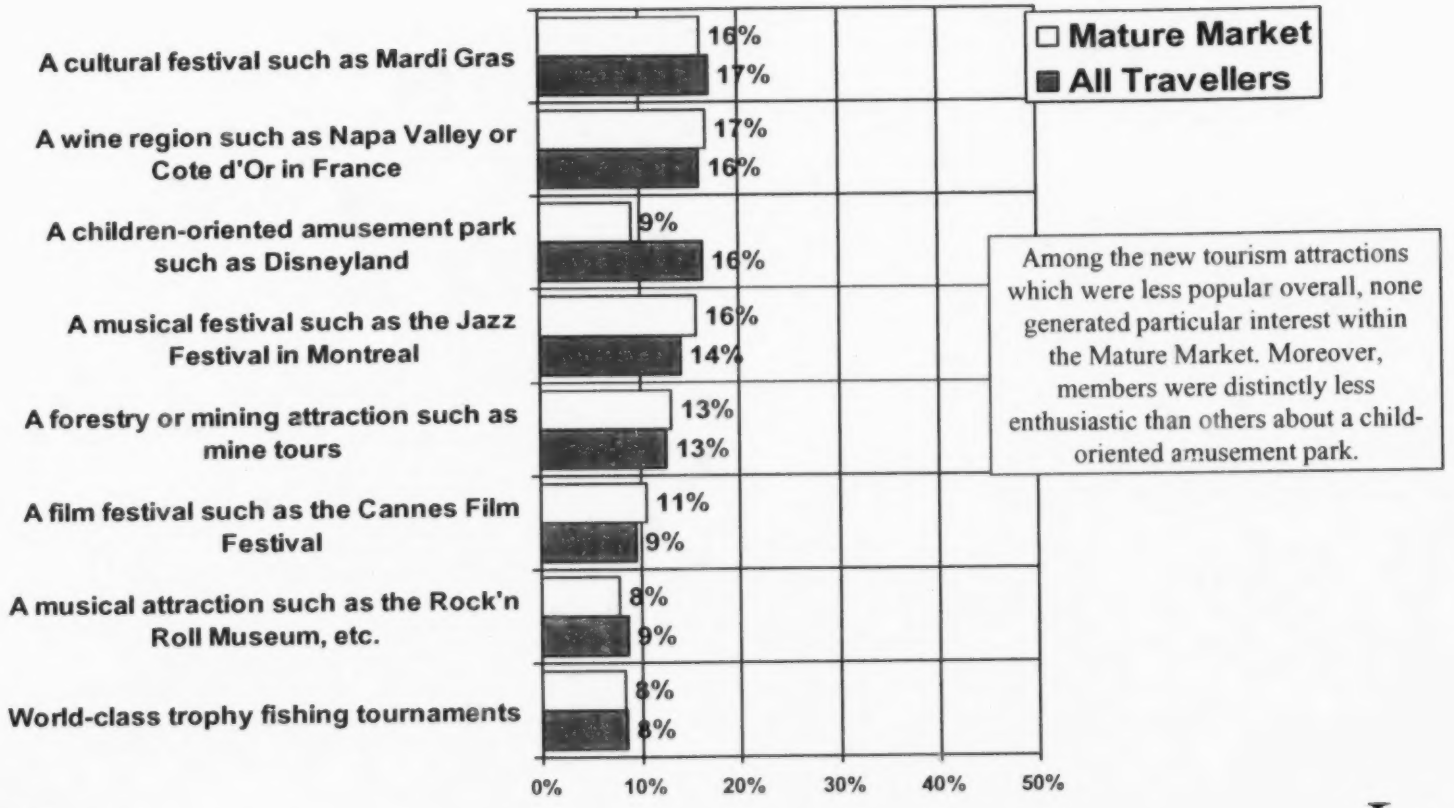
Base: Total Population (18-Plus) Who Took a Trip in Last Two Years: Canada and United States (Mailback Survey)



Mature Market Interest in New Tourism Products (Part Two of Two)

Percent Stating Attraction Would Make Them "A Lot More Interested" in Taking a Trip to Ontario

Base: Total Population (18-Plus) Who Took a Trip in Last Two Years: Canada and United States (Mailback Survey)



Among the new tourism attractions which were less popular overall, none generated particular interest within the Mature Market. Moreover, members were distinctly less enthusiastic than others about a child-oriented amusement park.

Section Six

Seniors Market

Detailed Lifecycle Market Profile

Seniors Market

The Seniors Market was the smallest of the four Lifecycle Markets, representing only 15 percent of the travel market. This market tended to have lower levels of education and household income. The Seniors Market was equally represented among women and men within Canada, although the American Seniors were more likely to be women than men.

Despite its relatively small size, the American Seniors Market deserves special attention from the Canadian travel industry since it was overrepresented among Americans who visited Canada during the past two years. This market's respondents were also more likely to travel to other parts of their own country and to overseas countries than average travellers. Note that members were less likely to have taken a trip to Mexico and the Caribbean in the last two years.

The respondents for the Seniors Market within Canada were less likely than average Canadian travellers to express intentions to take a trip in Canada over the next two years. Although the difference was smaller, respondents from the American Seniors Market were also less likely than average to express intentions to visit Canada in the next two years. In general, seniors were observed to be less likely to express intentions to travel to any destination, suggesting that seniors were less likely to make longer range travel plans.

The Seniors Market respondents were most likely to have sought out exploratory vacation experiences. They are much less likely to view vacations as opportunities for romance and relaxation, suggesting that vacations are periods to seek out stimulation and enrichment, rather than a time for rest and recuperation. While generally less active in outdoor activities than average travellers, their interest in exploratory vacation activities was reflected in their above-average viewing of natural phenomena and natural sightseeing, as well as visits to gardens and natural attractions, museum, art galleries and historical sites, and cultural festivals. However, the Seniors Market members also found time for some entertainment and were more likely to have gambled at casinos or horse races, to have attended an international sporting event or to have patronised the high arts (e.g., ballet, opera) while travelling. The Seniors Market respondents were more likely than average travellers to have taken guided tours of country or city areas.

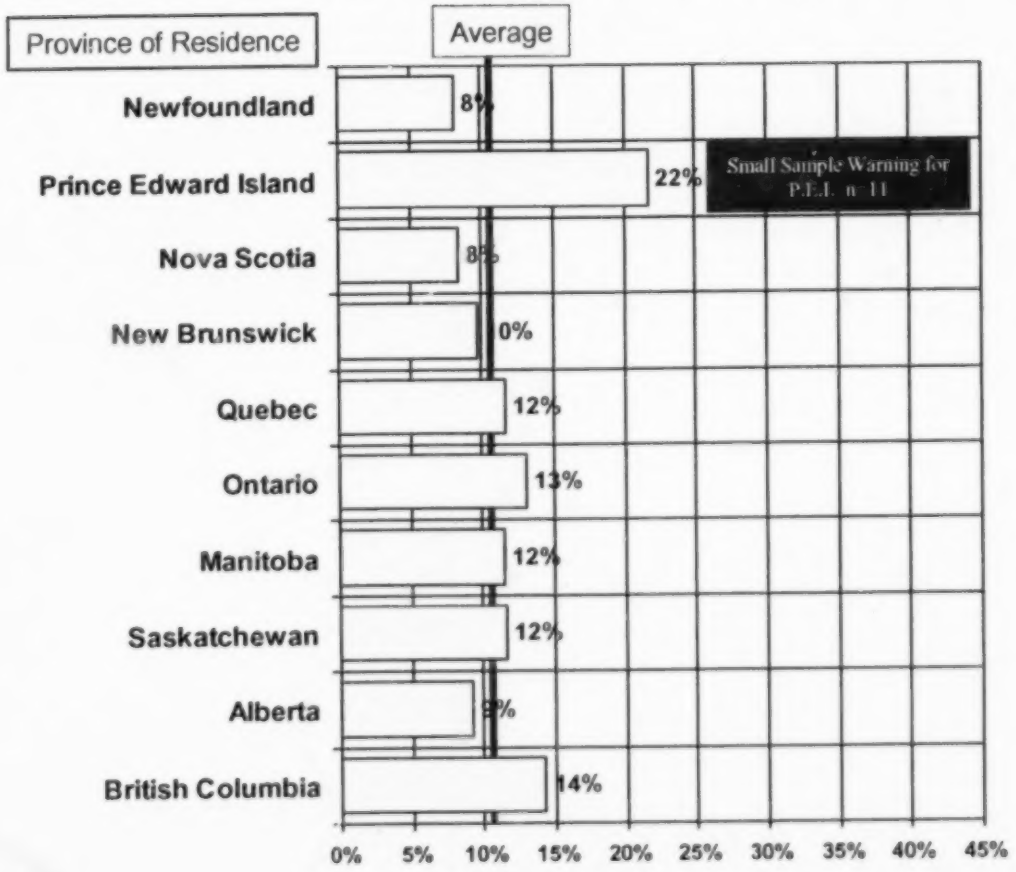
The Seniors Market made more use than others of traditional travel information sources, especially printed information received in the mail, airline reservation systems and auto clubs.

Television and print media provide efficient channels for targeting this market. The Seniors Market were above-average television viewers, and were especially over-represented among the weekday daytime programming audience. They were above-average viewers of news programming and above-average readers of newsmagazines.

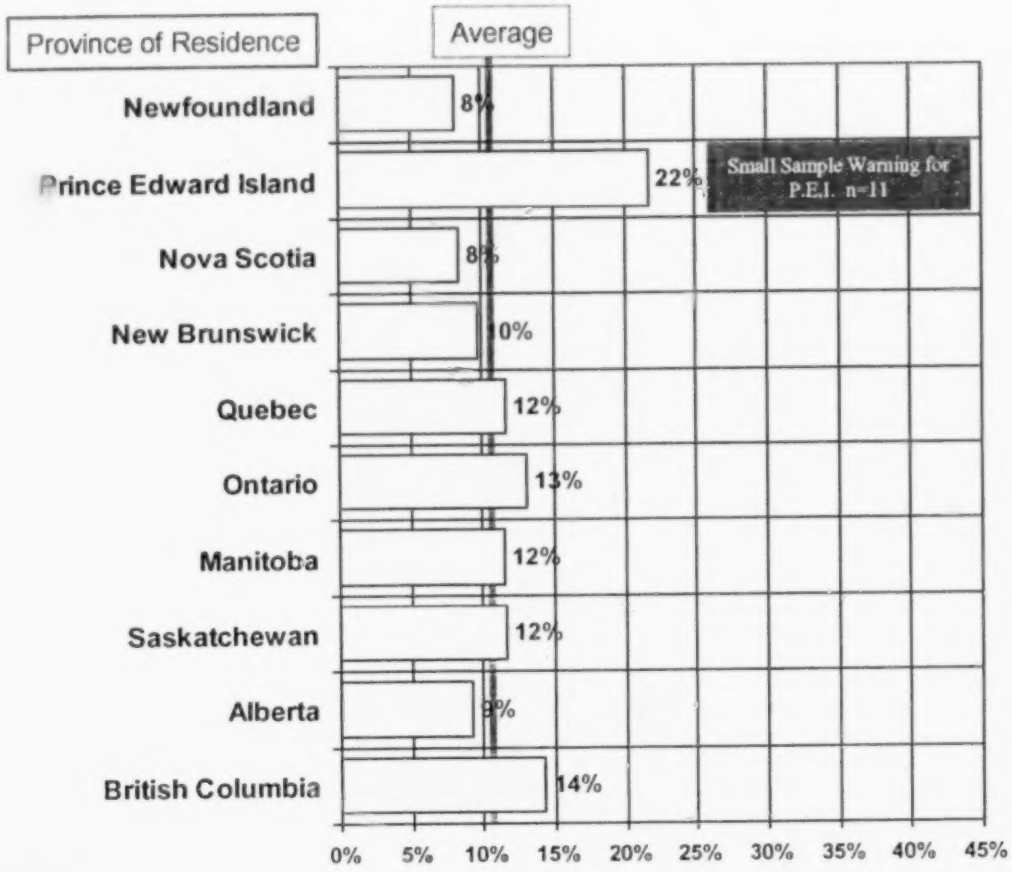
Lifecycle Markets Incidence in Canada

Seniors Market: By Province

Base: Adult (18-Plus) Canadian Population Who Took a Trip or Plans to Take a Trip in Last/Next Two Years



The Seniors Market was over-represented in British Columbia and Prince Edward Island (although the results for P.E.I are based on a very small sample size).

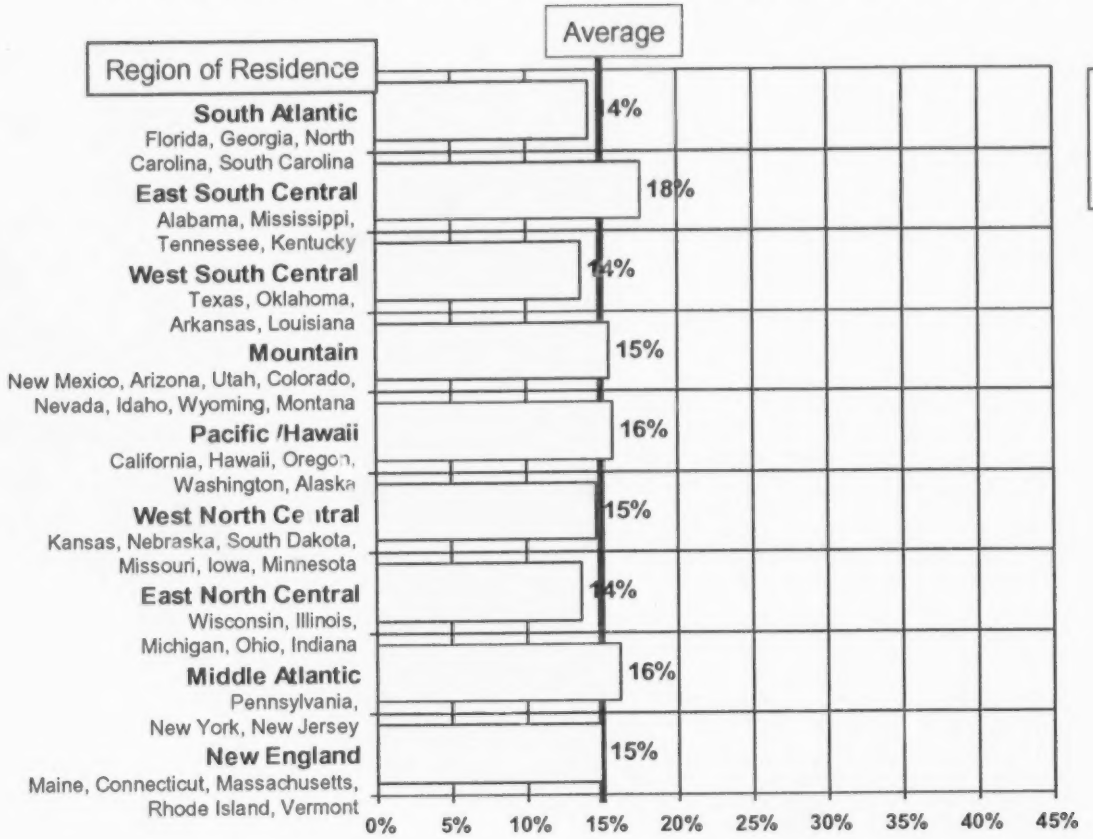


The Seniors Market was over-represented in British Columbia and Prince Edward Island (although the results for P.E.I are based on a very small sample size).

Lifecycle Markets Incidence in United States

Seniors Market: By U.S. Region

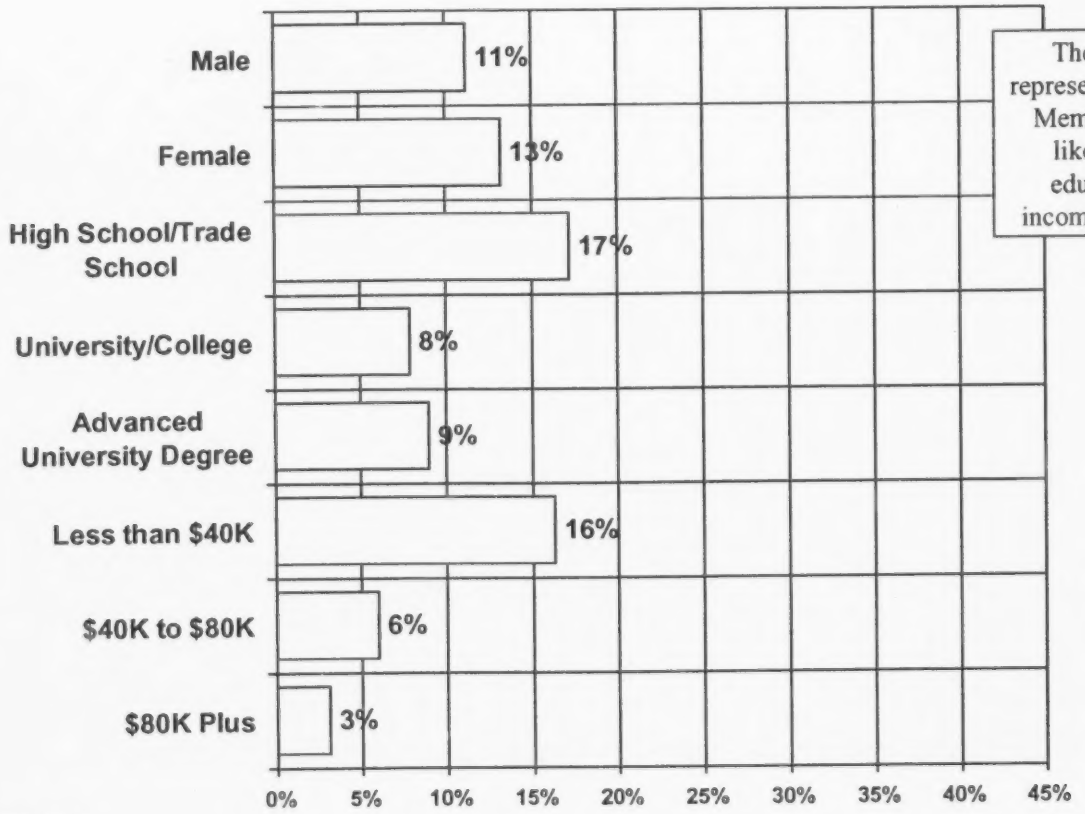
Base: Adult (18-Plus) American Population Who Took a Trip or Plans to Take a Trip in Last/Next Two Years



The Seniors Market was uniformly distributed across the various regions of the United States.

Lifecycle Markets: Seniors Market
Canada: By Demographics

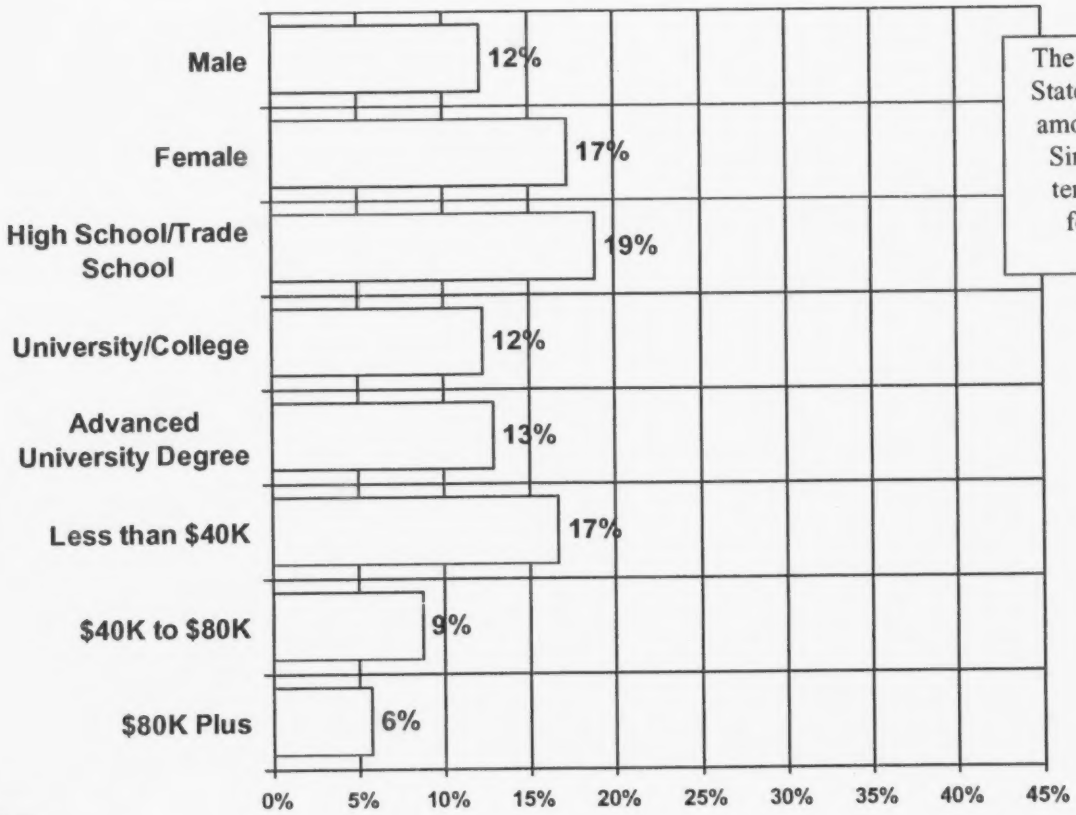
Base: Percent of Population (18-Plus) Who Either travelled in Last Two Years Or Intends to Travel in Next Two Years



The Seniors Market had similar representation among men and women. Members of this market were more likely to have high/trade school educations and lower household incomes (less than $40,000 per year).

Lifecycle Markets: Seniors Market
United States: By Demographics

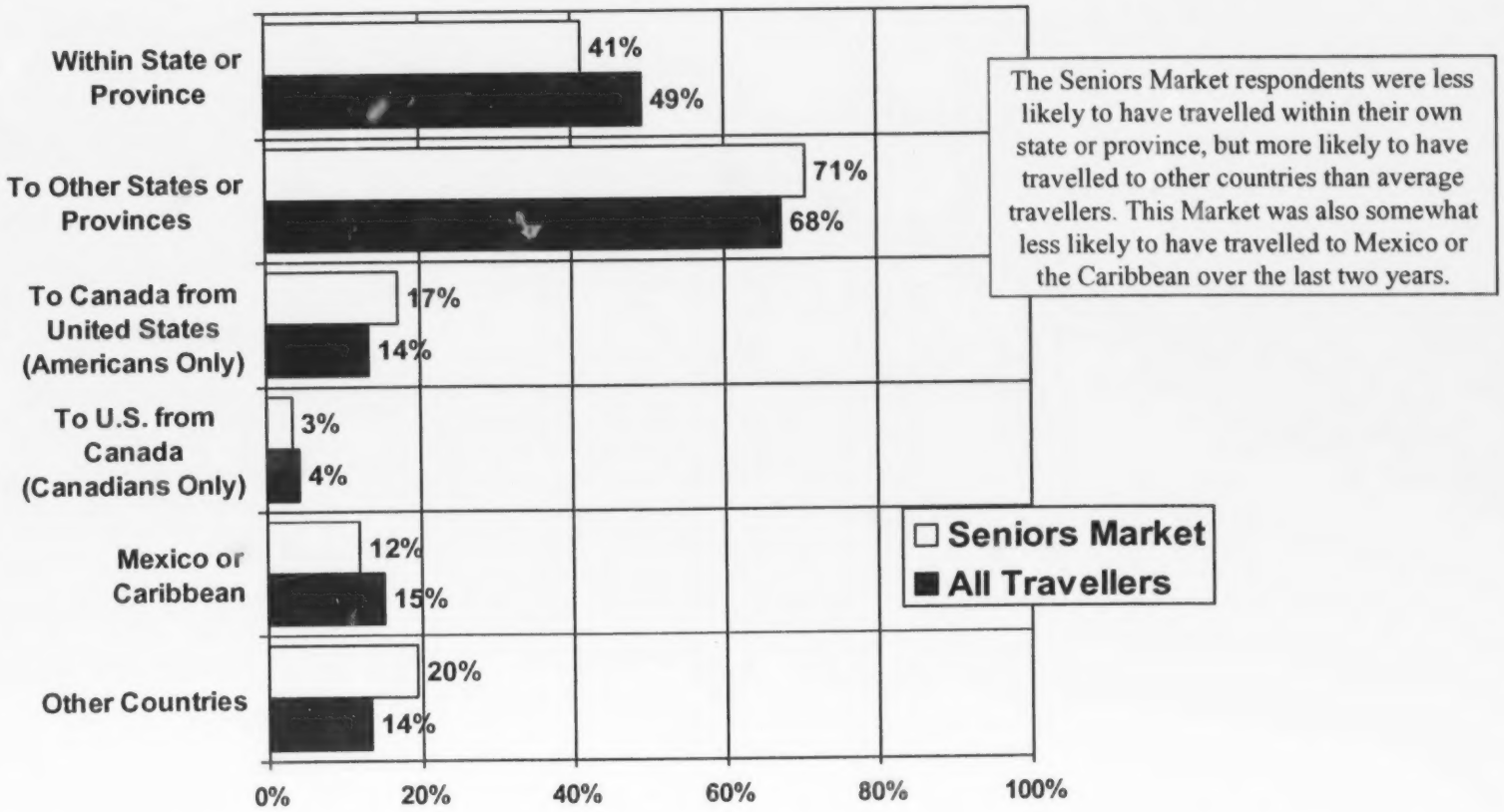
Base: Percent of Population (18-Plus) Who Either travelled in Last Two Years
Or Intends to Travel in Next Two Years



The Seniors Market in the United States had a higher representation among women than among men. Similar to Canada, this market tended to have lower levels of formal education and lower household incomes.

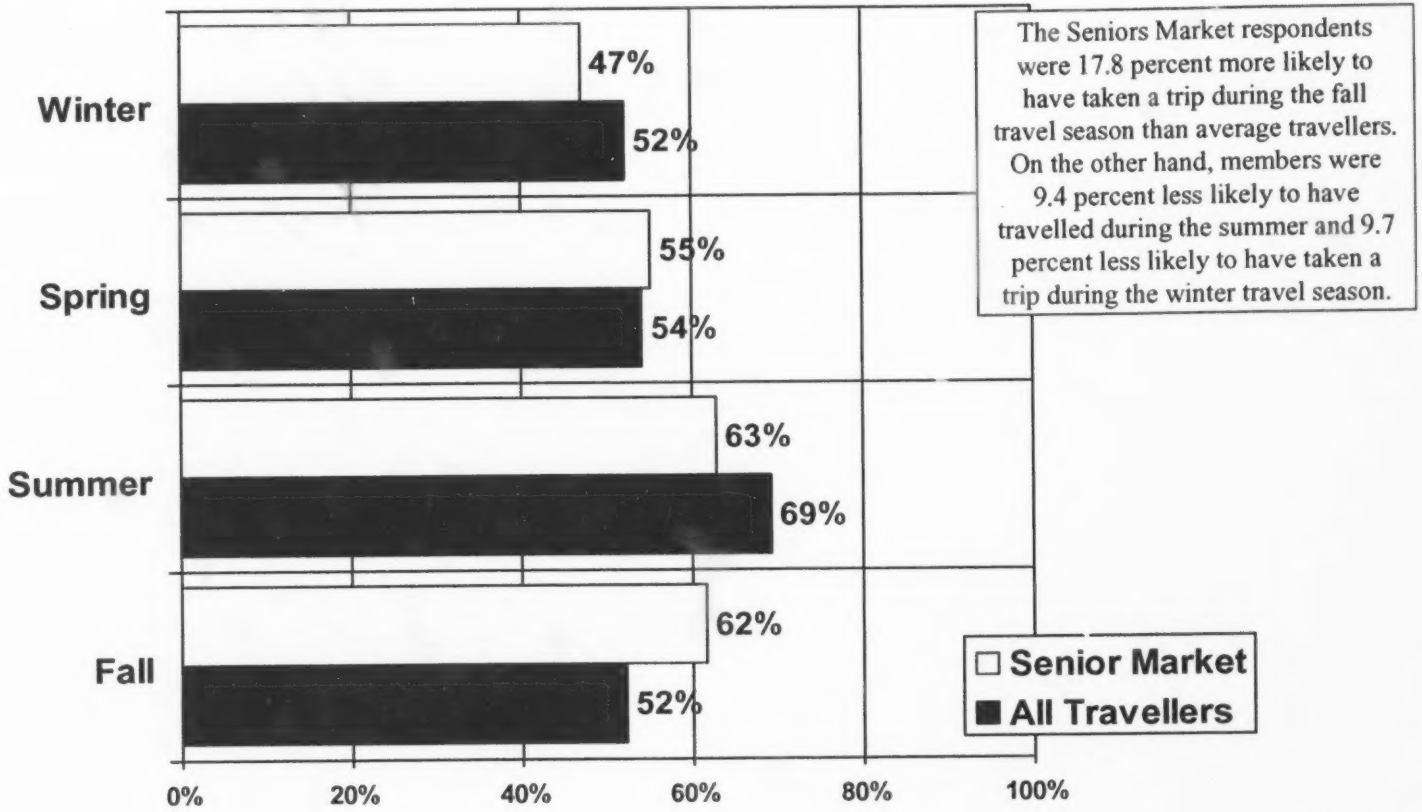
Seniors Market
Percent Taking Overnight Pleasure Trips To Various Destinations in Last Two Years

Base: Adult (18-Plus) American/Canadian Population Who Took an Overnight Trip in the Last Two Years

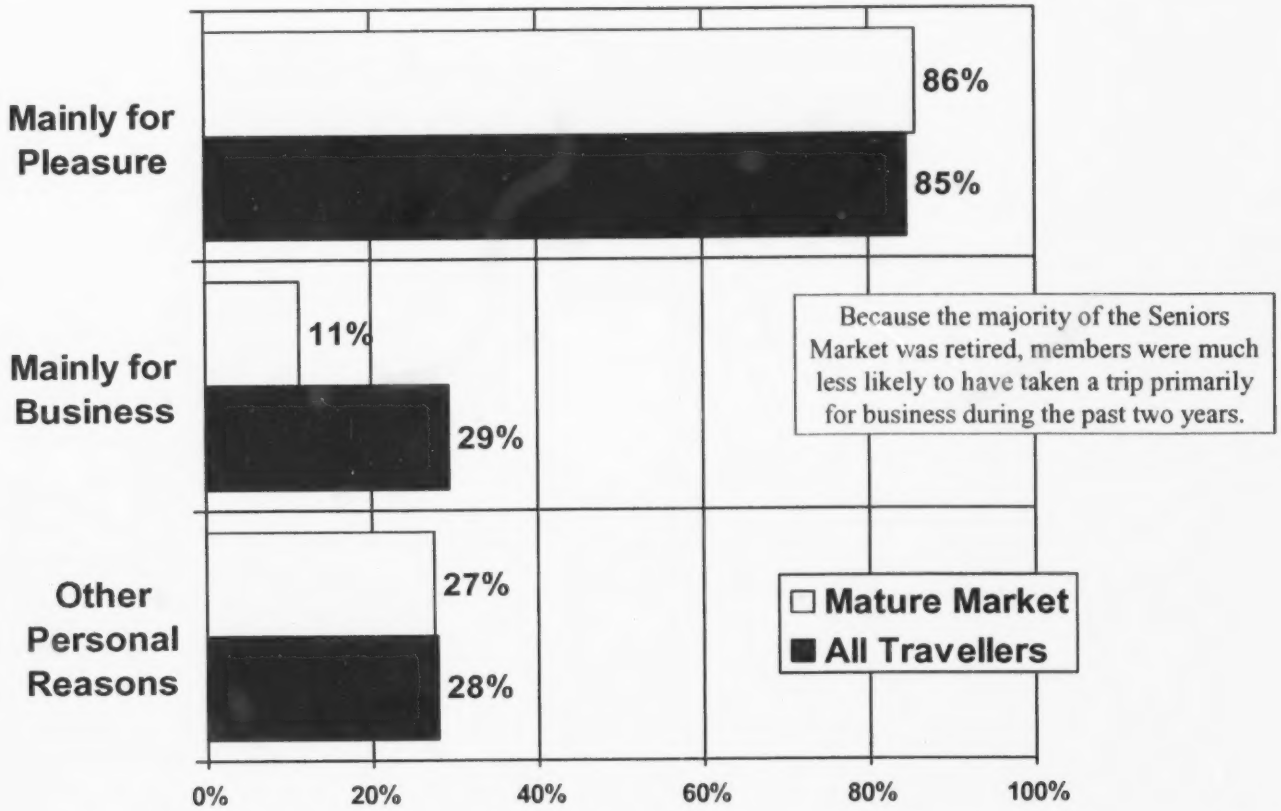


The Seniors Market respondents were less likely to have travelled within their own state or province, but more likely to have travelled to other countries than average travellers. This Market was also somewhat less likely to have travelled to Mexico or the Caribbean over the last two years.

Seniors Market
Percent Taking Overnight Pleasure Trips
To Various Destinations By Season in Last Two Years
Base: Adult (18-Plus) American/Canadian Population Who Took an Overnight Trip in Last Two Years

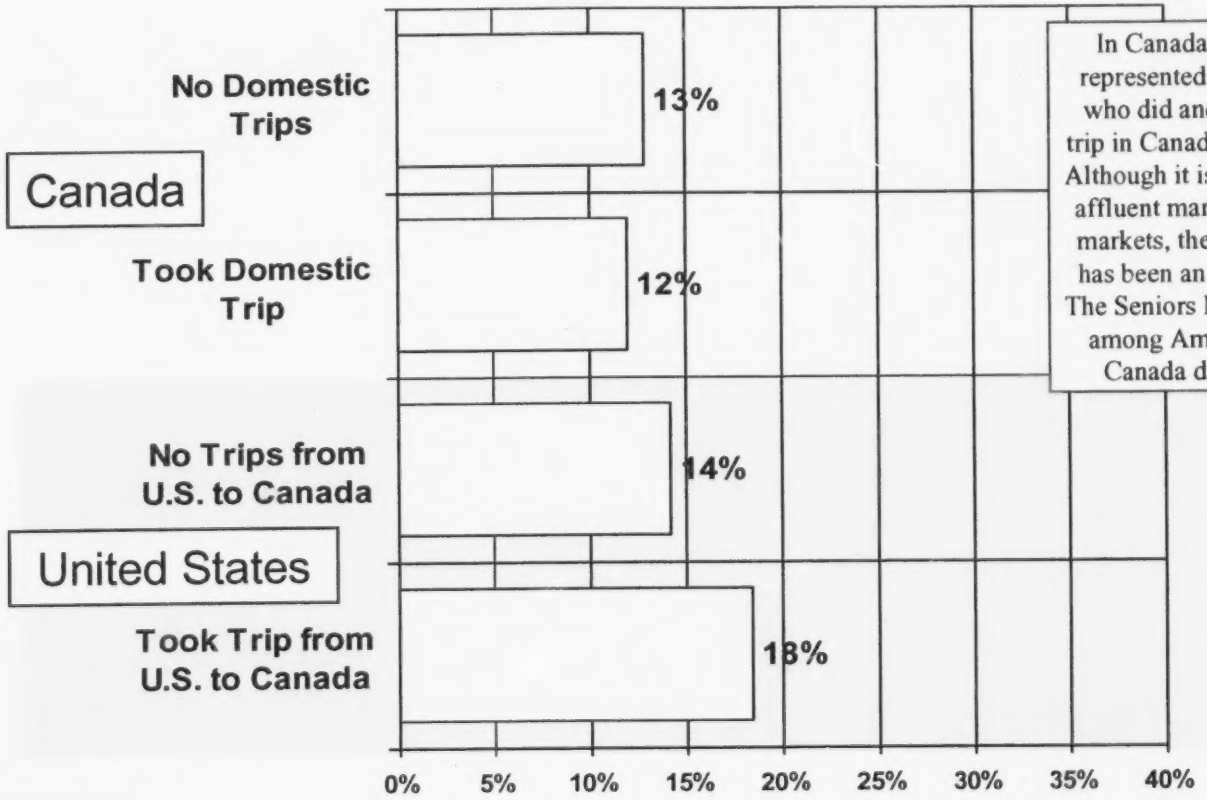


Seniors Market
Percent Taking Overnight Pleasure Trip
To Various Destinations For Various Reasons in Last Two Years
Base: Adult (18-Plus) American/Canadian Population Who Took an Overnight Trip in Last Two Years



Canada vs. U.S.: By Trips in Canada Last Two Years. Percent Taking at Least One Trip in Canada Within Last Two Years

Base: Percent of Population (18-Plus) Who Either Traveled in Last Two Years Or Intends to Travel in Next Two Years

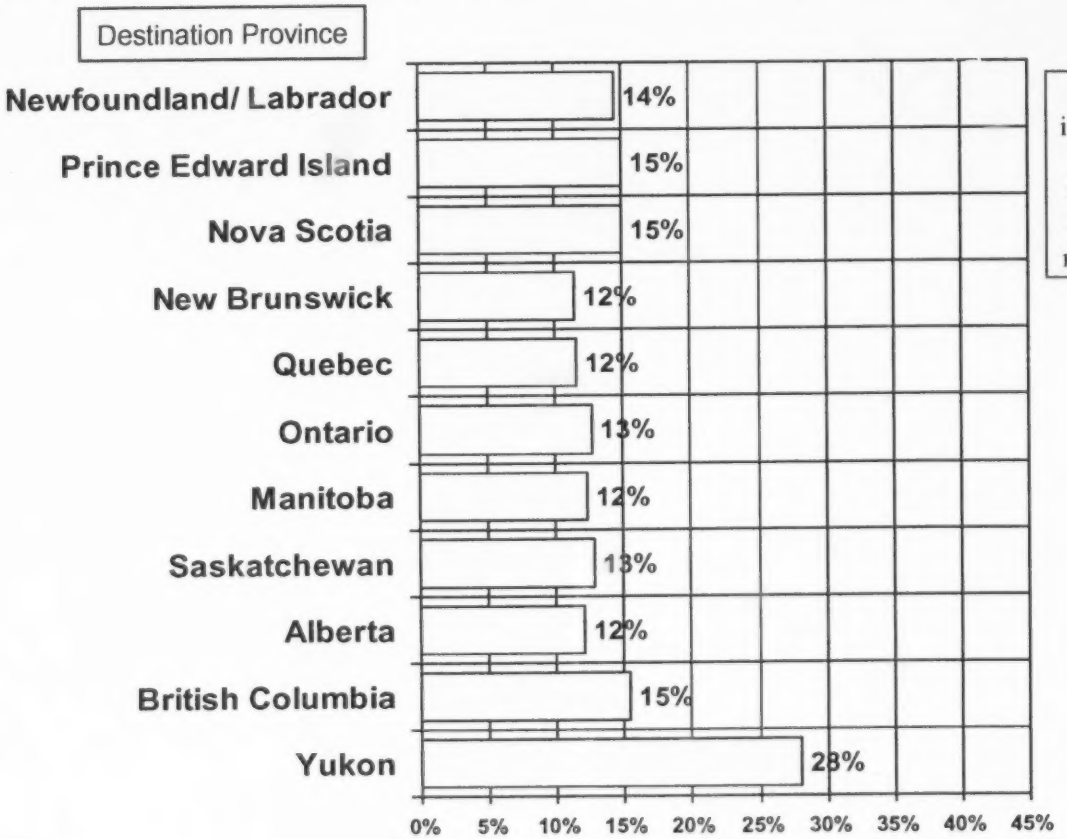


In Canada, the Seniors Market was represented equally among both those who did and those who did not take a trip in Canada within the past two years. Although it is relatively small, and a less affluent market than the other lifecycle markets, the American Seniors Market has been an important one for Canada. The Seniors Market was overrepresented among Americans who took a trip to Canada during the past two years.

Seniors Market

Percent of Canadians Taking an Overnight Pleasure Trip To Various Provinces in Last Two Years

Base: Adult (18-Plus) Canadian Population Who Took an Overnight Trip Within Canada in the Last Two Years

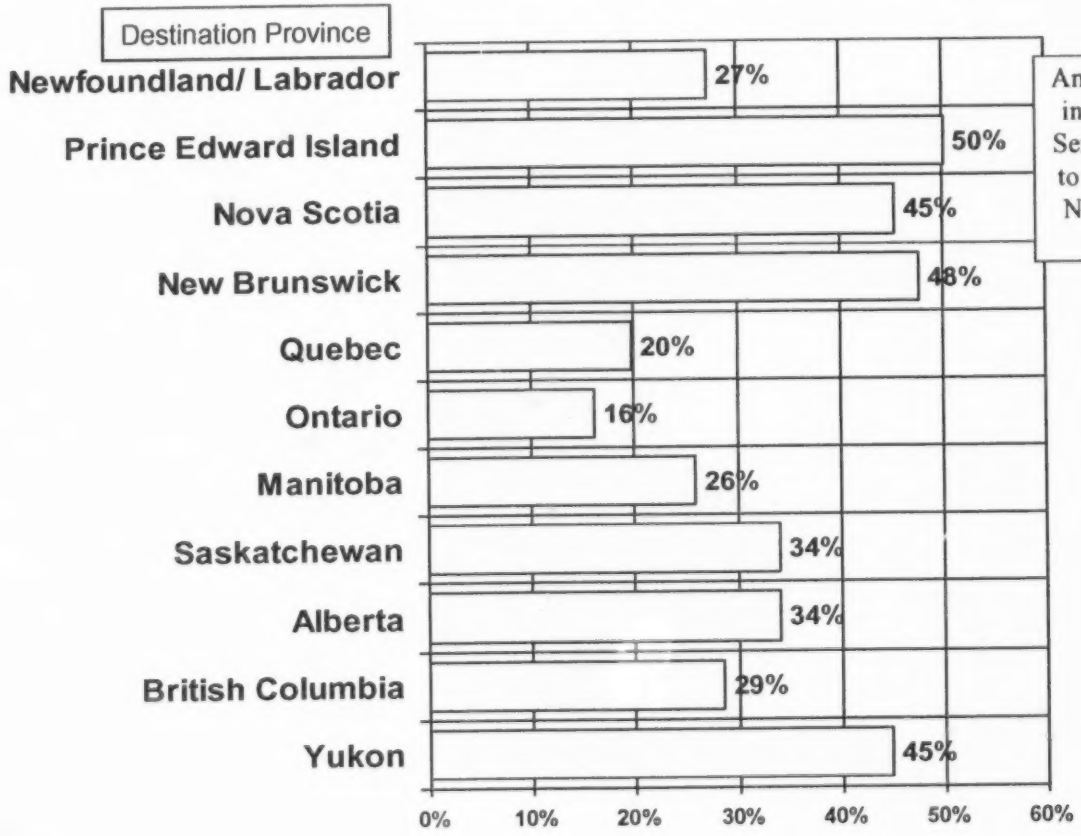


The Seniors Market was an important market for the Yukon. Roughly one-quarter of Canadian visitors to the Yukon during the past two years were members of the Seniors Market.

Seniors Market

Percent of Americans Taking an Overnight Pleasure Trip To Various Provinces in Last Two Years

Base: Adult (18-Plus) American Population Who Took an Overnight Trip to Canada in the Last Two Years

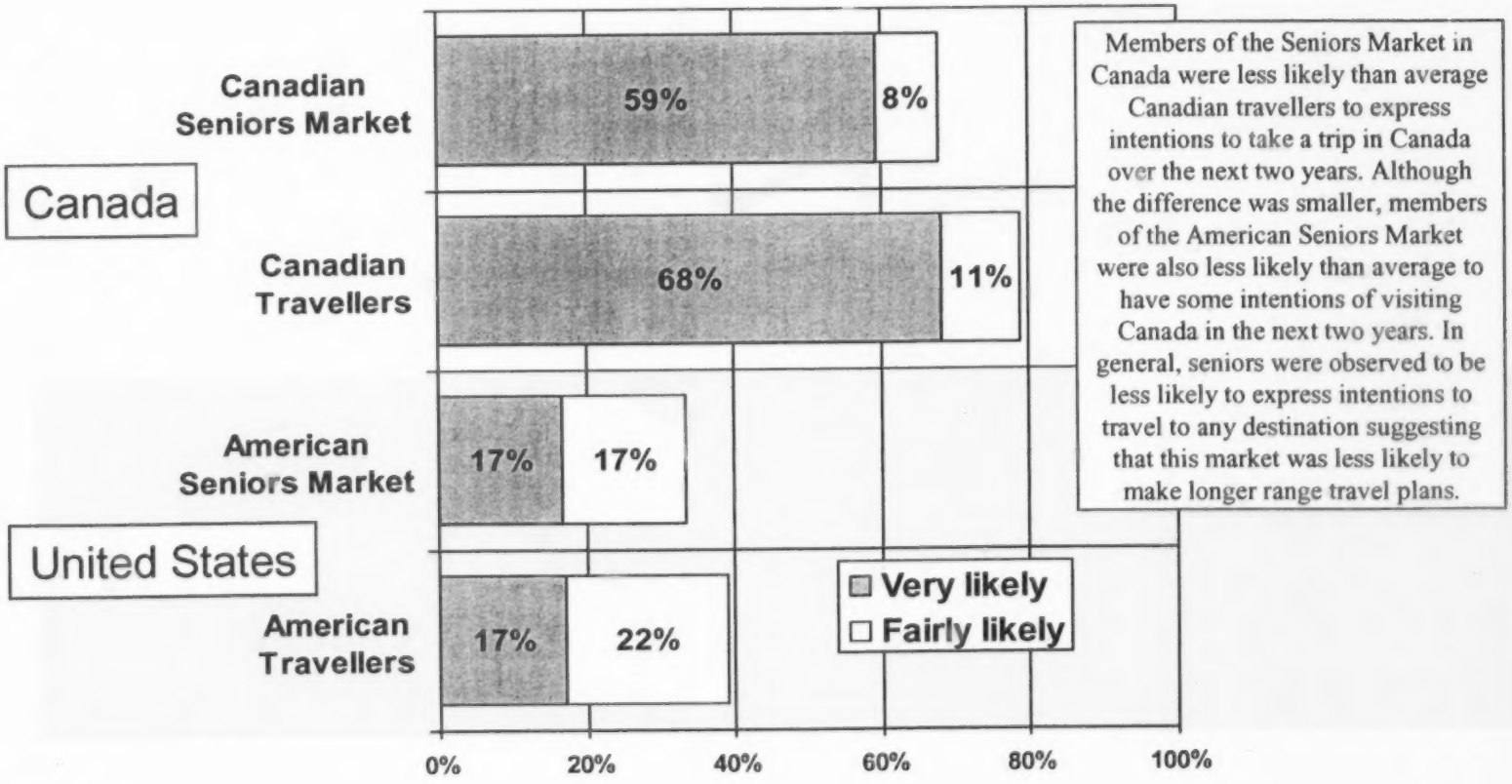


Among Americans who visited Canada in the past two years, members of the Seniors Market were much more likely to have visited P.E.I, New Brunswick, Nova Scotia and the Yukon Territory than other parts of the country.

Lifecycle Markets

Seniors Market: Intentions to Travel Within/To Canada Next Two Years

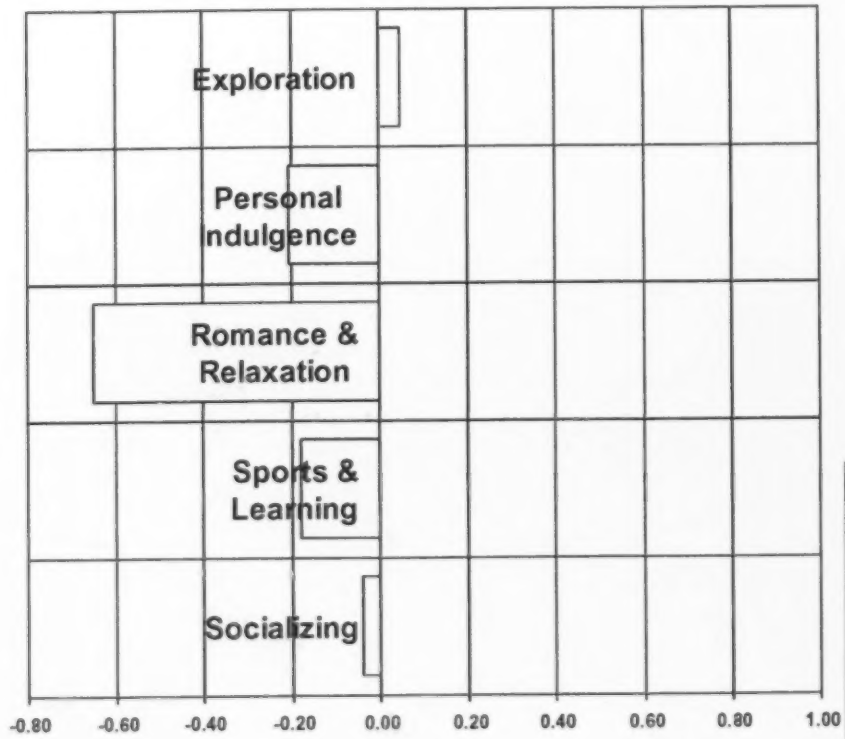
Base: Adult Population (18-Plus) Who Took an Overnight Trip in Last Two Years



Members of the Seniors Market in Canada were less likely than average Canadian travellers to express intentions to take a trip in Canada over the next two years. Although the difference was smaller, members of the American Seniors Market were also less likely than average to have some intentions of visiting Canada in the next two years. In general, seniors were observed to be less likely to express intentions to travel to any destination suggesting that this market was less likely to make longer range travel plans.

Seniors Market
General Vacation Experiences Sought During Pleasure Travel in the Last Two Years

Base: Total Population (18-Plus) Who Took an Overnight Trip in Last Two Years: Canada and United States (Mailback Survey)



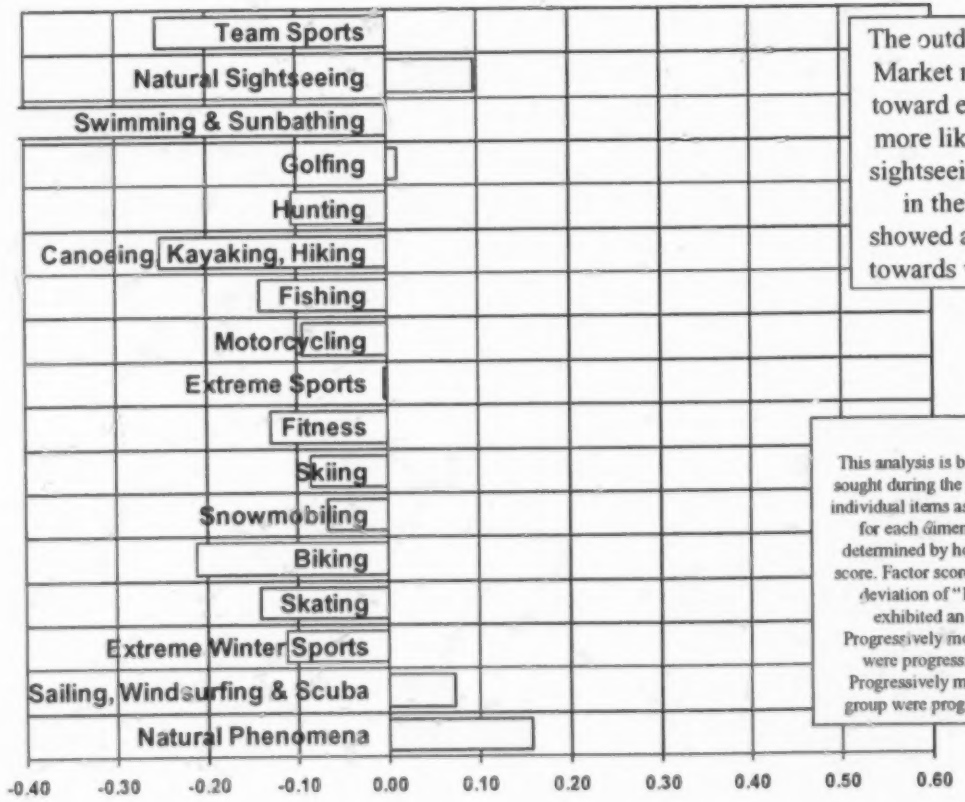
The Seniors Market respondents were most likely to have sought out exploratory vacation experiences. They are much less likely to view vacations as opportunities for romance and relaxation, suggesting that vacations are periods to seek out stimulation and enrichment, rather than periods for rest and recuperation.

Technical Note

This analysis was based on a factor analysis of the vacation experiences sought during the past two years. See Appendix Three for a description of the individual items associated with each of these factor scores. The factor scores for each dimension were determined by the weighted sum of all items. The weight for each item was determined by how much the item correlated with the overall factor score. Factor scores were standardised with an average of "0" and a standard deviation of "1". A value of "0" means that the travellers in the group exhibited an average tendency to pursue a given vacation experience. Progressively more positive values indicate that the travellers in the group were progressively more likely to have pursued the vacation experience. Progressively more negative values indicate that the travellers within the group were progressively less likely to have pursued the vacation experience.

Seniors Market
Outdoor Activities Sought During Pleasure Travel in the Last Two Years

Base: Total Population (18-Plus) Who Took an Overnight Trip in Last Two Years: Canada and United States (Mailback Survey)



The outdoor activities sought by the Seniors Market members reflected their orientation toward exploratory experiences. They were more likely than average to include natural sightseeing and viewing natural phenomena in their vacation itineraries. They also showed a slightly above-average inclination towards water-based activities (e.g. sailing).

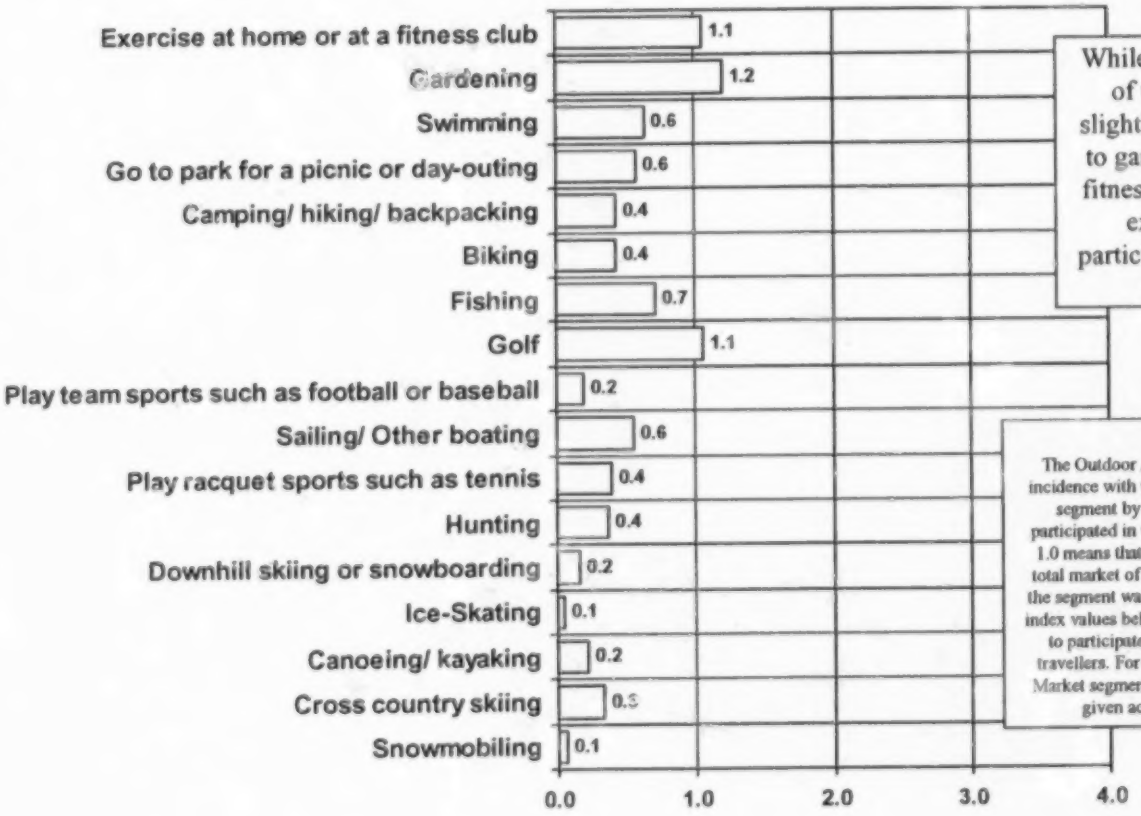
Technical Note

This analysis is based on a factor analysis of the outdoor vacation activities sought during the past two years. See Appendix Four for a description of the individual items associated with each of these factor scores. The factor scores for each dimension were determined by the weighted sum of all items determined by how much any given item correlated with the overall factor score. Factor scores were standardised with an average of "0" and a standard deviation of "1". A value of "0" means that the travellers in the group exhibited an average tendency to pursue a given vacation activity. Progressively more positive values indicate that the travellers in the group were progressively more likely to have pursued the vacation activity. Progressively more negative values indicate that the travellers within the group were progressively less likely to have pursued the vacation activity.

Seniors Market

Outdoor Activities Sought While Not Travelling (Indexed)

Base: Total Population (18-Plus) Who Took an Overnight Trip in Last Two Years.
Canada and United States (Mailback Survey)



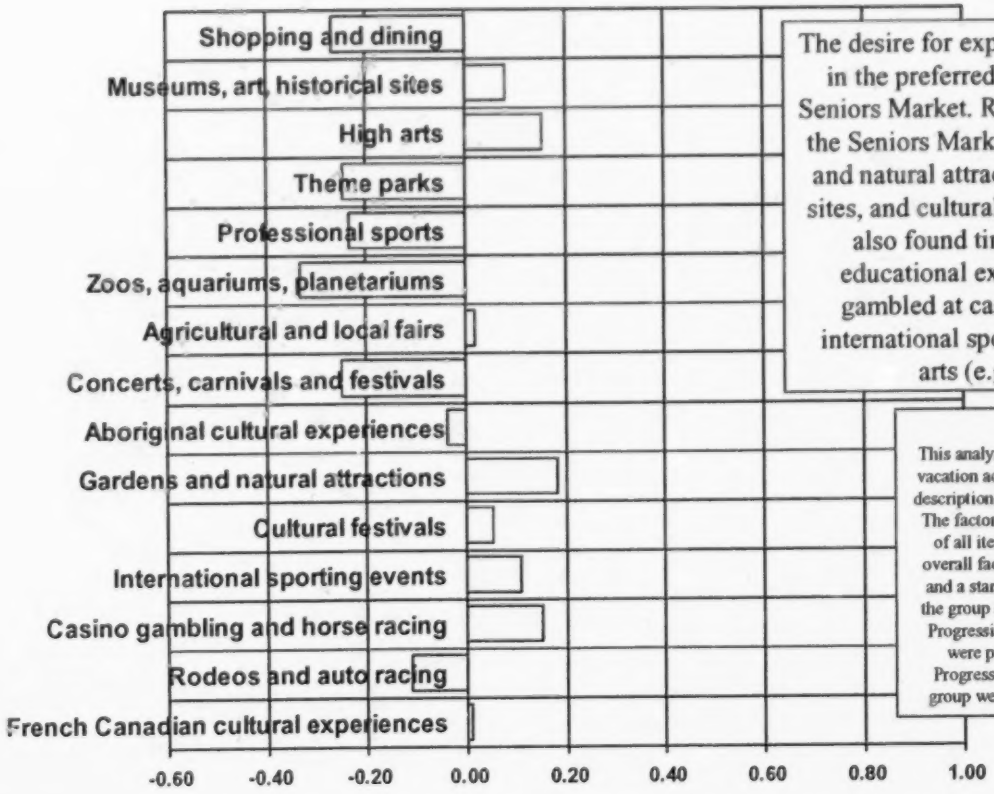
While not on vacation, members of the Seniors Market were slightly more likely than average to garden, golf and exercise at a fitness club. The Seniors Market exhibited below-average participation for most other types of outdoor activities.

Technical Note

The Outdoor Activity Index was computed by dividing the incidence with which each activity was participated in by each segment by the incidence with which each activity was participated in within the total market of travellers. A score of 1.0 means that activity participation rate was the same as the total market of travellers. Index values above 1.0 indicate that the segment was more likely to participate in the activity while index values below 1.0 indicate that the segment was less likely to participate in the activity relative to the total market of travellers. For example, an index value of 1.2 means that the Market segment was 20 percent more likely to participate in a given activity than the total market of travellers.

Culture and Entertainment Activities Sought During Pleasure Travel in the Last Two Years

Base: Total Population (18-Plus) Who Took an Overnight Trip in Last Two Years: Canada and United States (Mailback Survey)



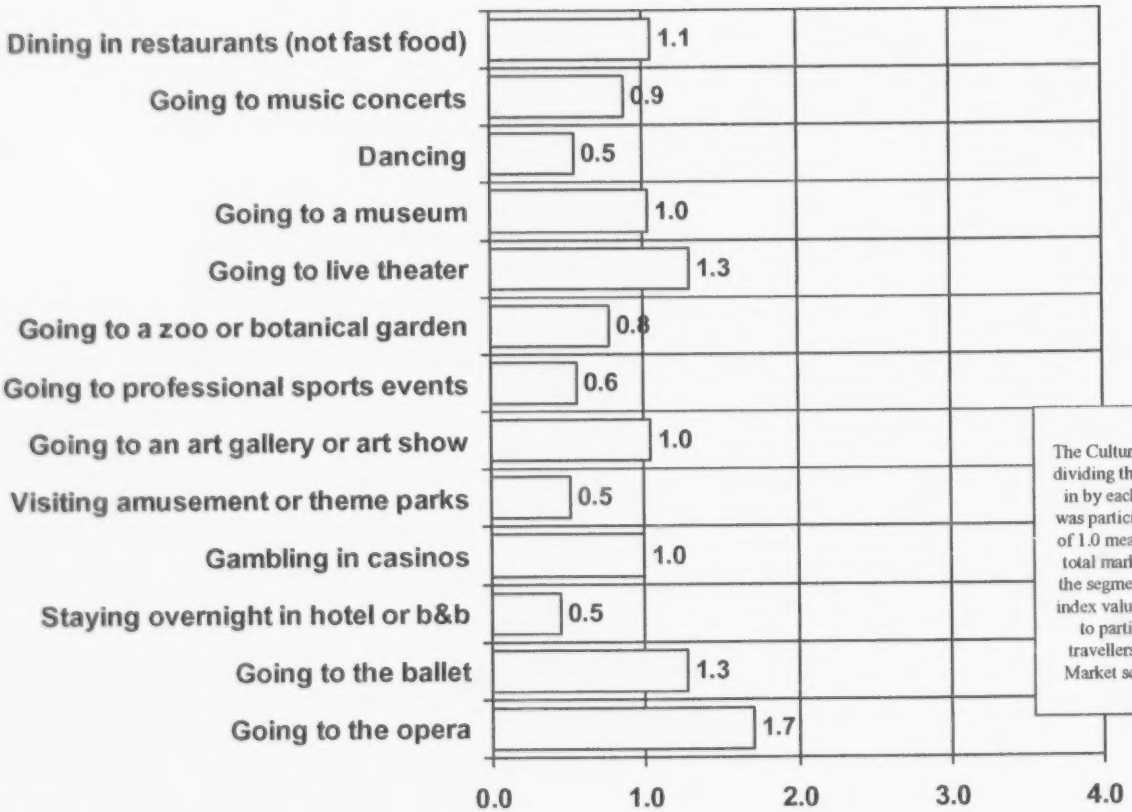
The desire for exploratory vacation experiences was reflected in the preferred culture and entertainment pursuits of the Seniors Market. Relative to the average traveller, members of the Seniors Market were more likely to have visited gardens and natural attractions, museum, art galleries and historical sites, and cultural festivals. The Seniors Market respondents also found time for some entertainment among their educational explorations and were more likely to have gambled at casinos or horse races, to have attended an international sporting event or to have patronised the high arts (e.g., ballet, opera) while travelling.

Technical Note

This analysis was based on a factor analysis of the culture and entertainment vacation activities sought during the past two years. See Appendix Five for a description of the individual items associated with each of these factor scores. The factor scores for each dimension were determined by the weighted sum of all items determined by how much any given item correlated with the overall factor score. Factor scores were standardised with an average of "0" and a standard deviation of "1". A value of "0" means that the travellers in the group exhibited an average tendency to pursue a given vacation activity. Progressively more positive values indicate that the travellers in the group were progressively more likely to have pursued the vacation activity. Progressively more negative values indicate that the travellers within the group were progressively less likely to have pursued the vacation activity.

Seniors Market
Culture and Entertainment Activities Sought While Not Travelling (Indexed)

Base: Total Population (18-Plus) Who Took an Overnight Trip in Last Two Years: Canada and United States (Mailback Survey)



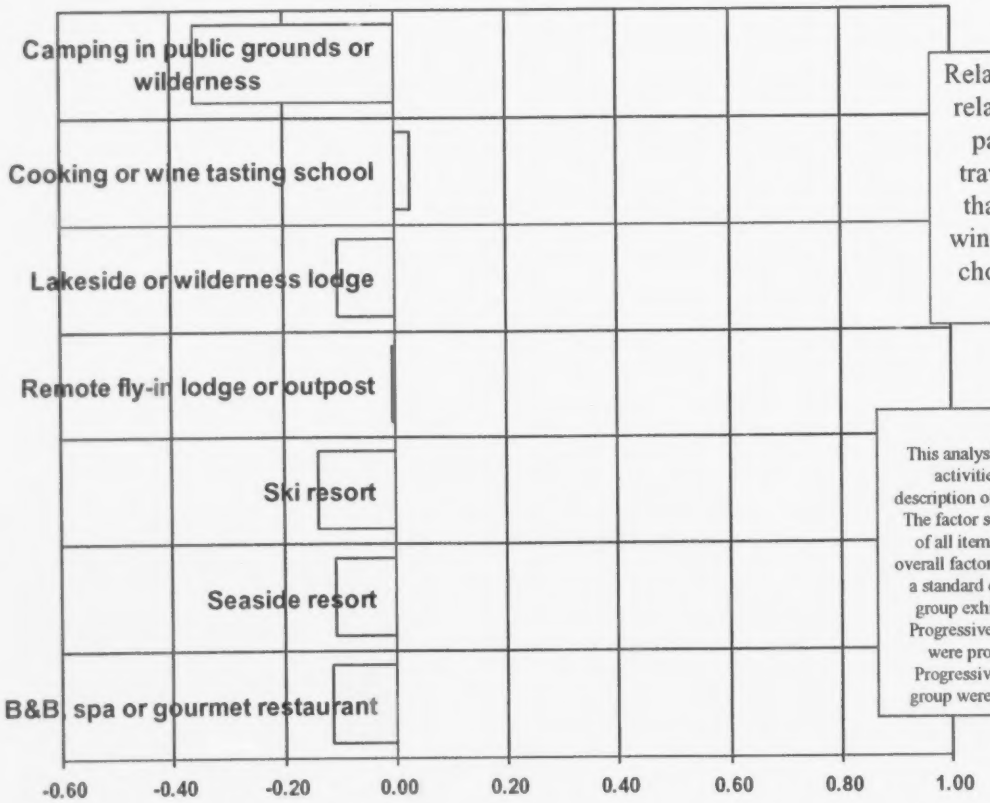
The interest in the high arts shown by the Seniors Market while travelling was also apparent when not travelling. Thus, Seniors were more likely than average to attend live theatre or to have patronised the ballet or opera.

Technical Note

The Culture and Entertainment Activity Index was computed by dividing the incidence with which each activity was participated in by each segment by the incidence with which each activity was participated in within the total market of travellers. A score of 1.0 means that activity participation rate was the same as the total market of travellers. Index values above 1.0 indicate that the segment was more likely to participate in the activity while index values below 1.0 indicate that the segment was less likely to participate in the activity relative to the total market of travellers. For example, an index value of 1.2 means that the Market segment is 20 percent more likely to participate in the activity than the total market of travellers.

Seniors Market
Accommodation-Related Activities Sought During Pleasure Travel in the Last Two Years

Base: Total Population (18-Plus) Who Took an Overnight Trip in Last Two Years: Canada and United States (Mailback Survey)



Relative to other travellers, accommodation-related activities did not form an important part of the Seniors Market respondents' travel. They were just slightly more likely than others to have included a cooking or wine-tasting school in their accommodation choices, but were much less likely to have camped out-of-doors.

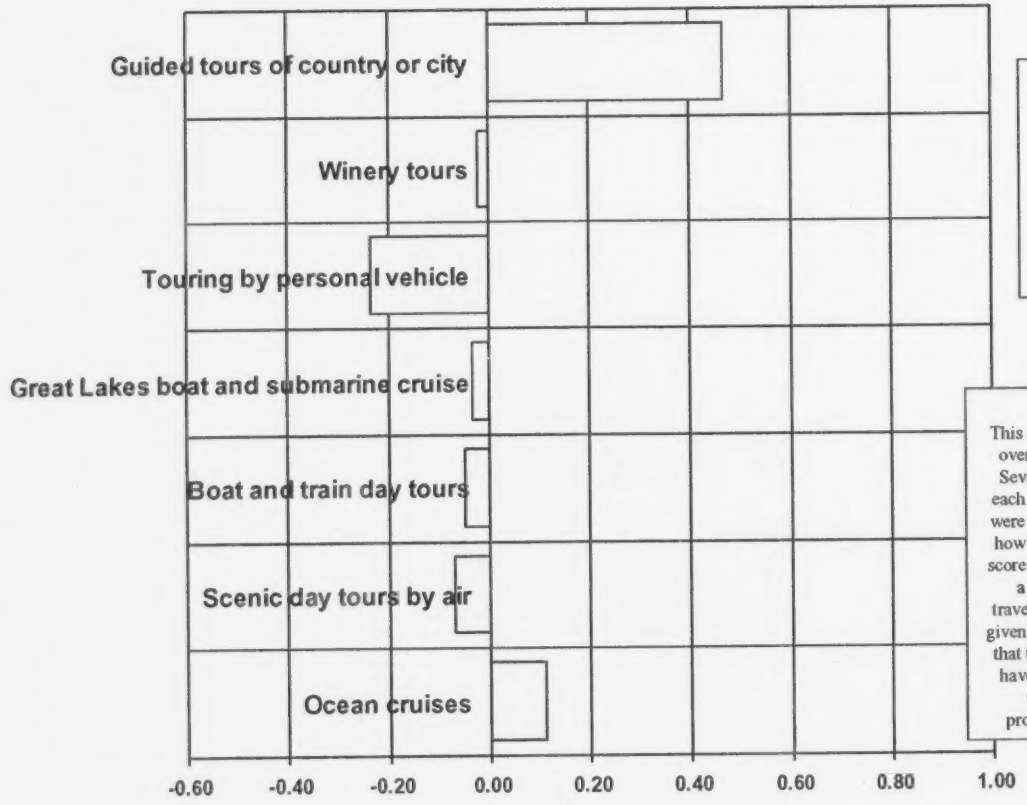
Technical Note

This analysis was based on a factor analysis of the accommodation-related activities sought during the past two years. See Appendix Six for a description of the individual items associated with each of these factor scores. The factor scores for each dimension were determined by the weighted sum of all items determined by how much any given item correlated with the overall factor score. Factor scores are standardised with an average of "0" and a standard deviation of "1". A value of "0" means that the travellers in the group exhibited an average tendency to pursue a given vacation activity. Progressively more positive values indicate that the travellers in the group were progressively more likely to have pursued the vacation activity. Progressively more negative values indicate that the travellers within the group were progressively less likely to have pursued the vacation activity.

Seniors Market

Day and Overnight Touring Activities in the Last Two Years

Base: Total Population (18-Plus) Who Took an Overnight Trip in Last Two Years: Canada and United States (Mailback Survey)



Members of the Seniors Market were much more likely than average to have gone on a guided tour of the country-side or a city while travelling during the past two years. They were also slightly more likely to take an ocean cruise.

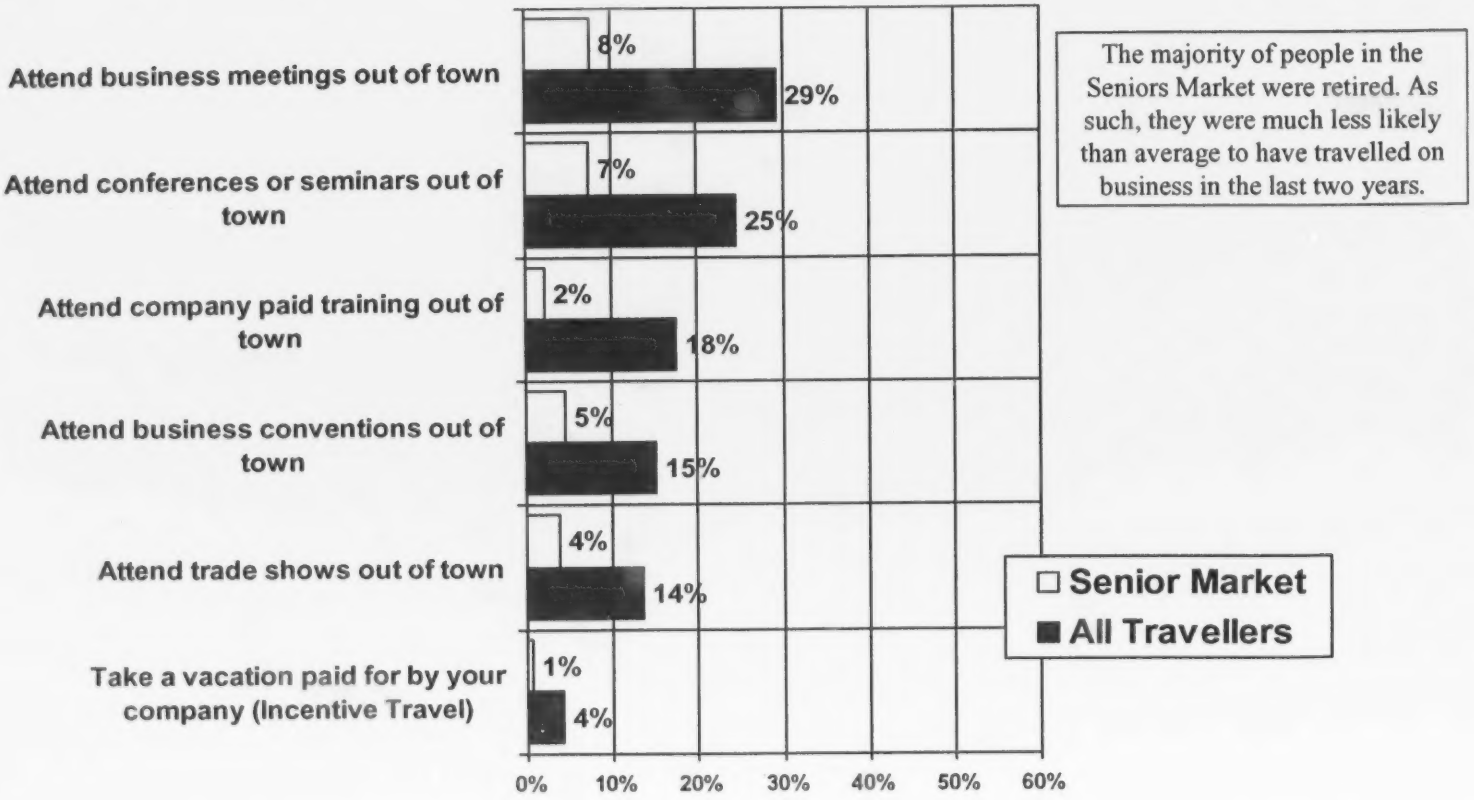
Technical Note

This analysis was based on a factor analysis of the same-day and overnight tours taken during the past two years. See Appendix Seven for a description of the individual items associated with each of these factor scores. The factor scores for each dimension were determined by the weighted sum of all items determined by how much any given item was correlated with the overall factor score. Factor scores were standardised with an average of "0" and a standard deviation of "1". A value of "0" means that the travellers in the group exhibited an average tendency to pursue a given touring activity. Progressively more positive values indicate that the travellers in the group were progressively more likely to have pursued the touring activity. Progressively more negative values indicate that the travellers within the group were progressively less likely to have pursued the touring activity.

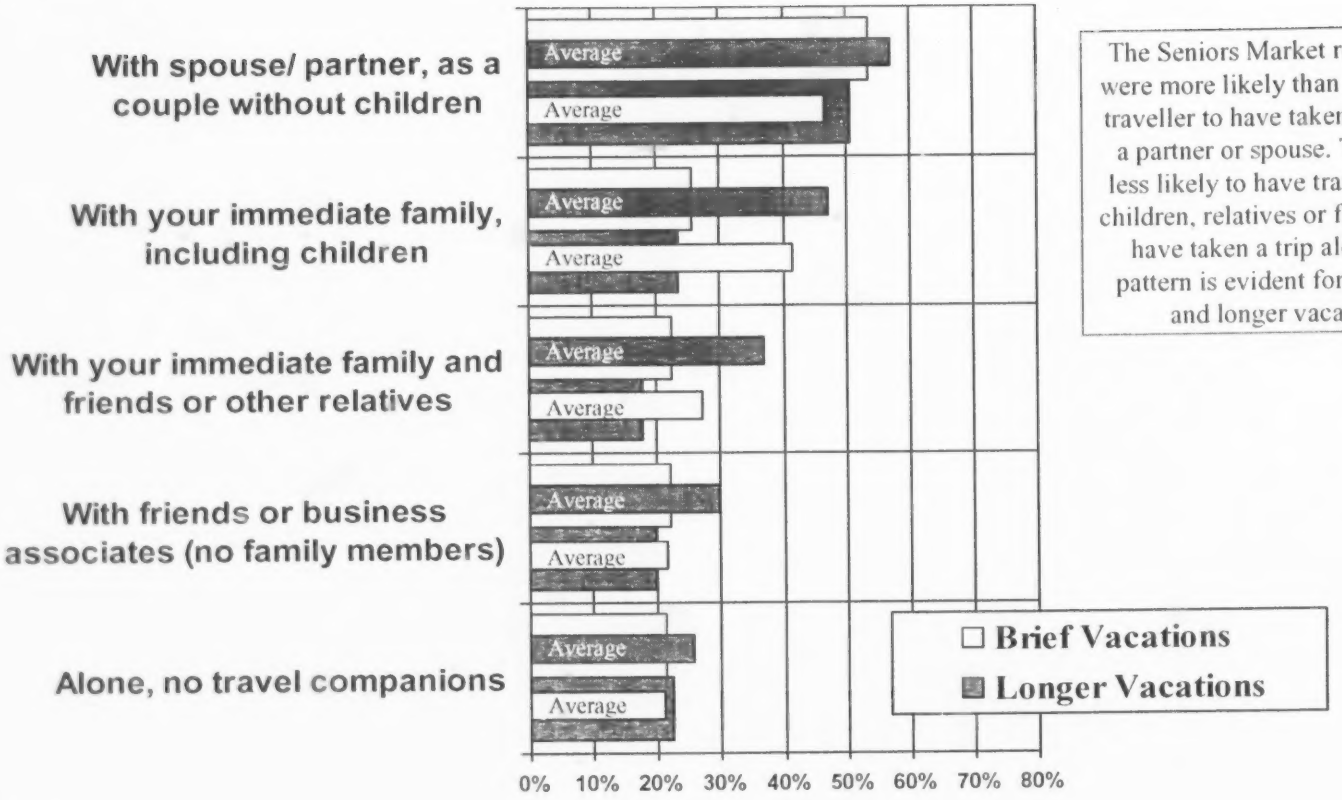
Seniors Market

Percent Taking Various Types of Overnight Business Trips in Last Two Years

Base: Total Population (18-Plus) Who Took an Overnight Trip in Last Two Years:
Canada and United States (Mailback Survey)



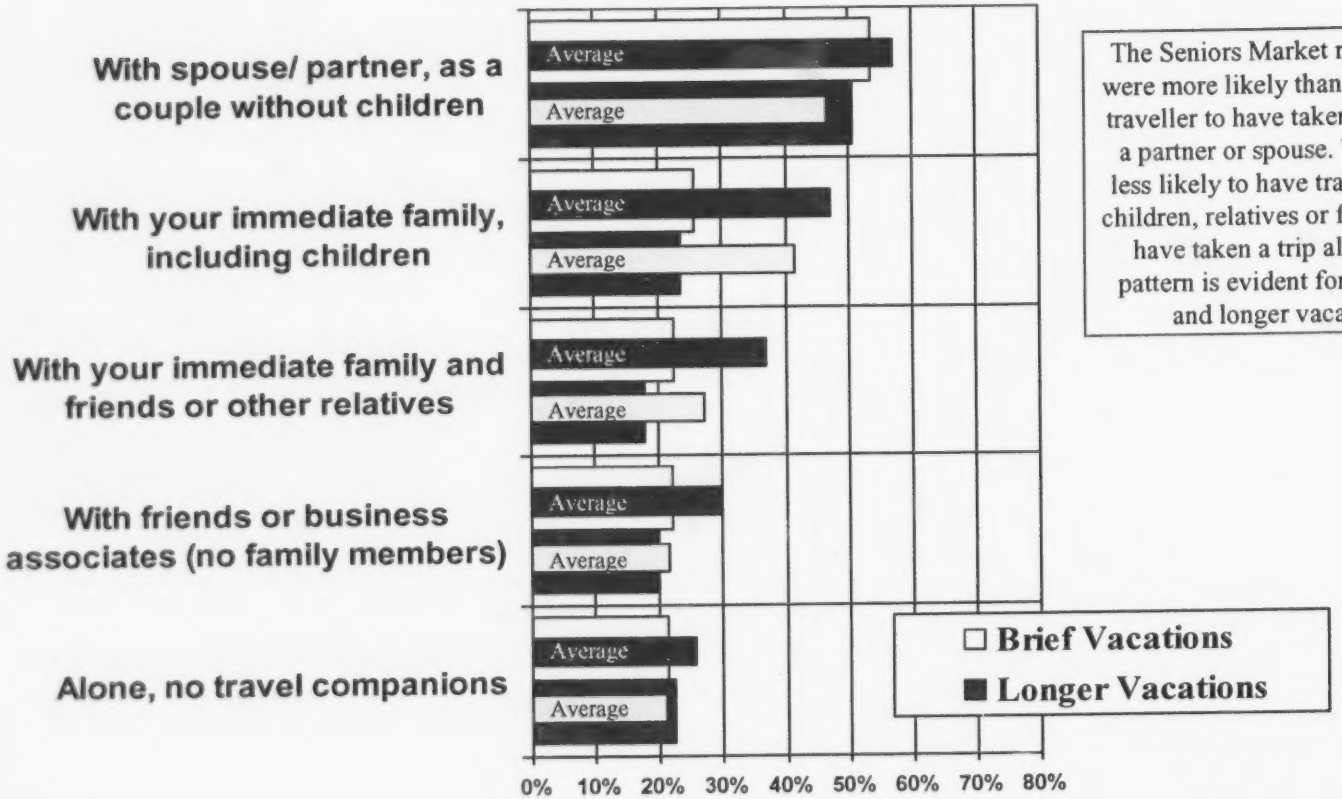
The majority of people in the Seniors Market were retired. As such, they were much less likely than average to have travelled on business in the last two years.



The Seniors Market respondents were more likely than the average traveller to have taken a trip with a partner or spouse. They were less likely to have travelled with children, relatives or friends, or to have taken a trip alone. This pattern is evident for both brief and longer vacations.

Seniors Market
Composition of Travel Party for Brief and Long Trips In Last Two Years

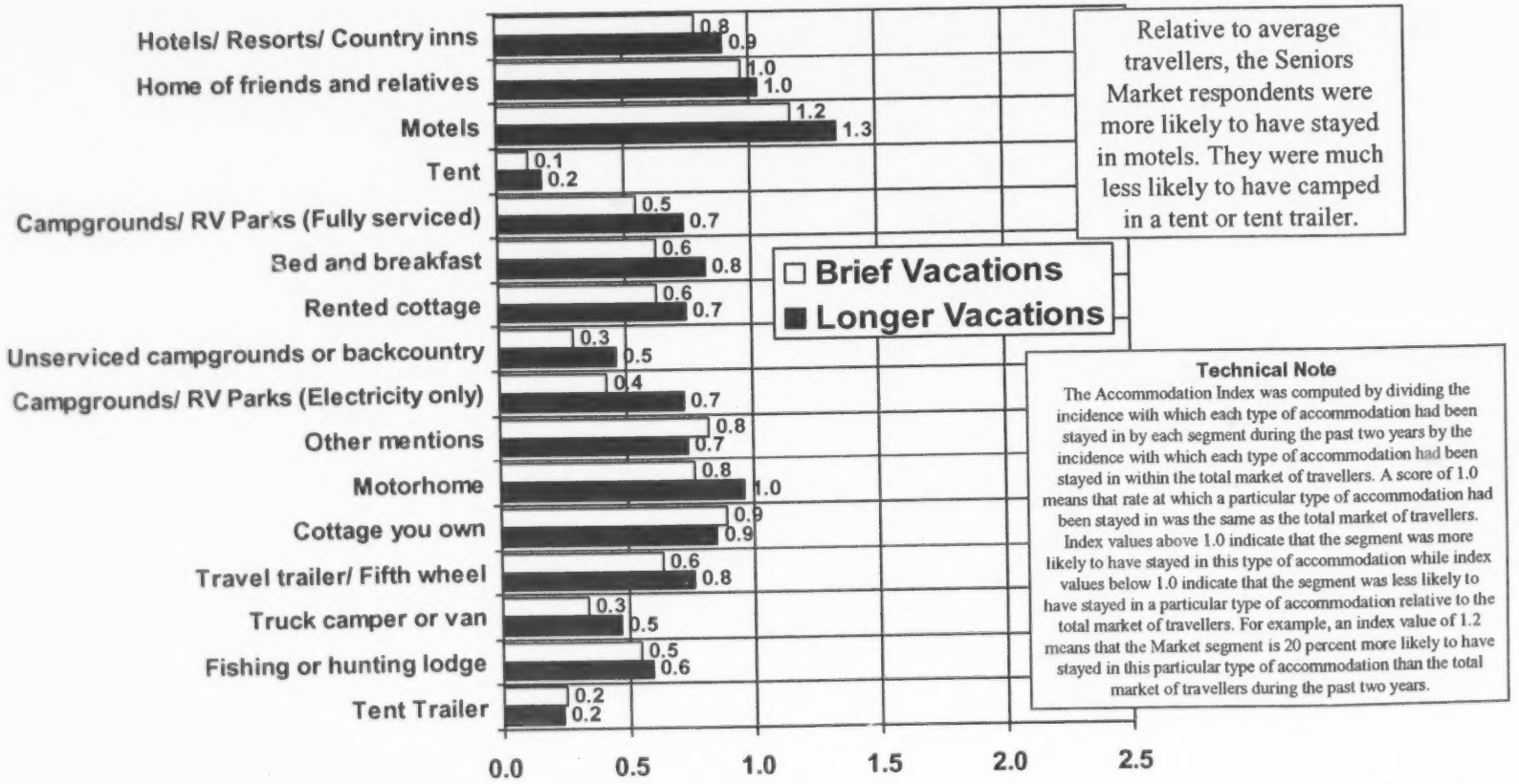
Base: Total Population (18-Plus) Who Took an Overnight Trip in Last Two Years: Canada and United States (Mailback Survey)



The Seniors Market respondents were more likely than the average traveller to have taken a trip with a partner or spouse. They were less likely to have travelled with children, relatives or friends, or to have taken a trip alone. This pattern is evident for both brief and longer vacations.

Types of Accommodations Used for Brief and Longer Trips In Last Two Years (Indexed)

Base: Total Population (18-Plus) Who Took an Overnight Trip in Last Two Years: Canada and United States (Mailback Survey)



Relative to average travellers, the Seniors Market respondents were more likely to have stayed in motels. They were much less likely to have camped in a tent or tent trailer.

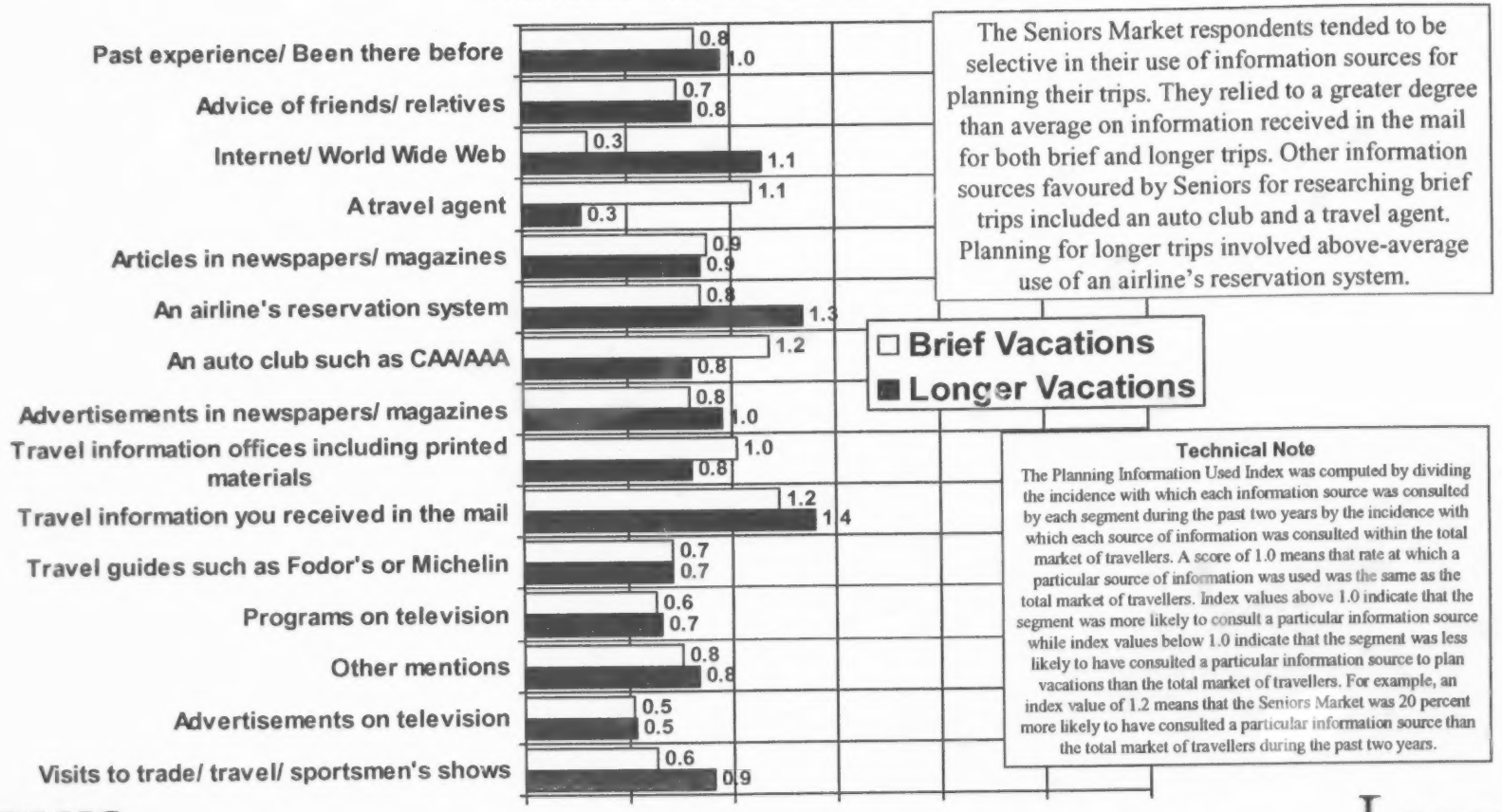
Technical Note

The Accommodation Index was computed by dividing the incidence with which each type of accommodation had been stayed in by each segment during the past two years by the incidence with which each type of accommodation had been stayed in within the total market of travellers. A score of 1.0 means that rate at which a particular type of accommodation had been stayed in was the same as the total market of travellers. Index values above 1.0 indicate that the segment was more likely to have stayed in this type of accommodation while index values below 1.0 indicate that the segment was less likely to have stayed in a particular type of accommodation relative to the total market of travellers. For example, an index value of 1.2 means that the Market segment is 20 percent more likely to have stayed in this particular type of accommodation than the total market of travellers during the past two years.

Seniors Market

Information Sources Used to Plan Brief and Longer Trips In Last Two Years (Indexed)

Base: Total Population (18-Plus) Who Took an Overnight Trip in Last Two Years: Canada and United States (Mailback Survey)



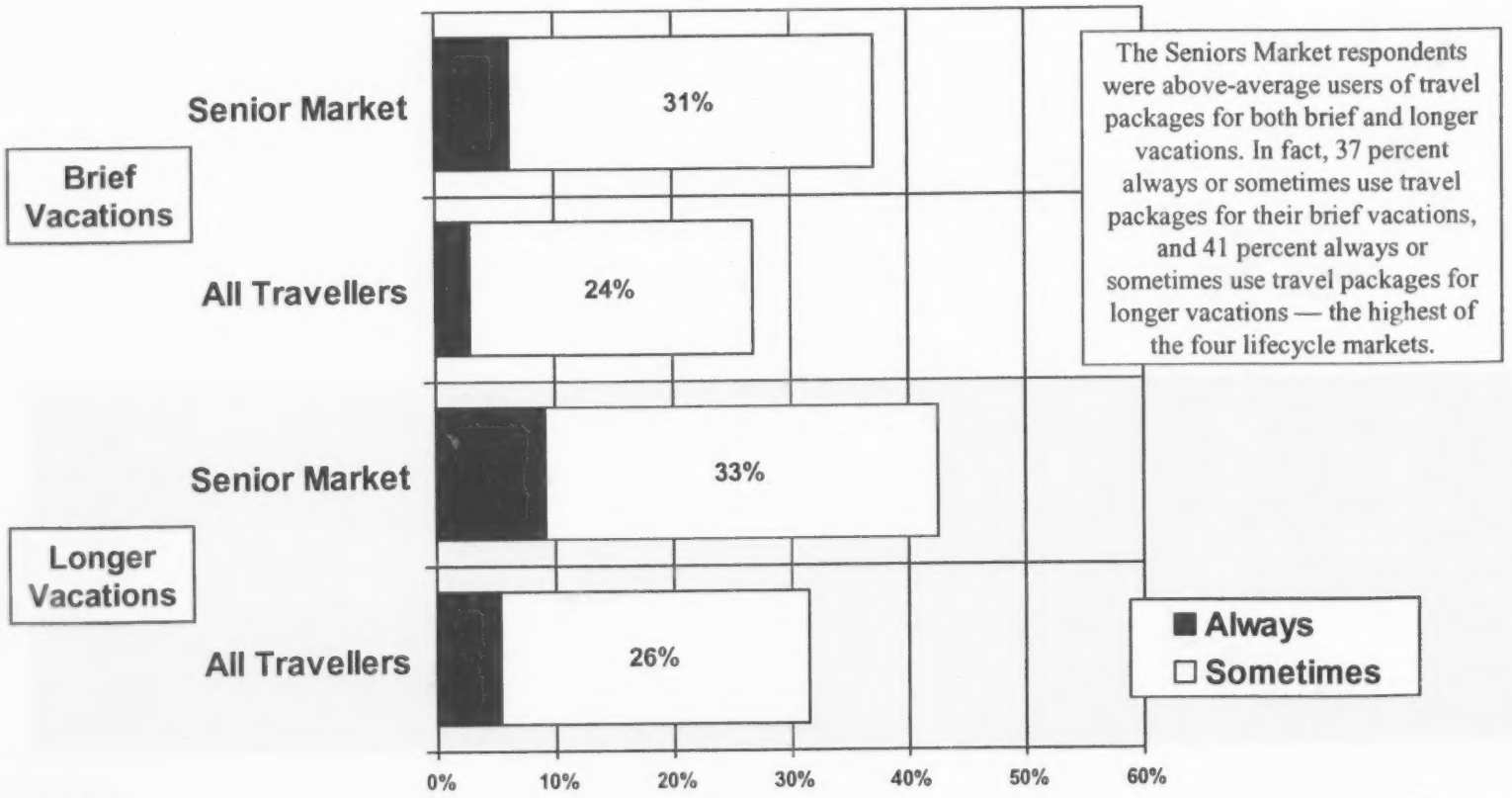
The Seniors Market respondents tended to be selective in their use of information sources for planning their trips. They relied to a greater degree than average on information received in the mail for both brief and longer trips. Other information sources favoured by Seniors for researching brief trips included an auto club and a travel agent. Planning for longer trips involved above-average use of an airline's reservation system.

Technical Note

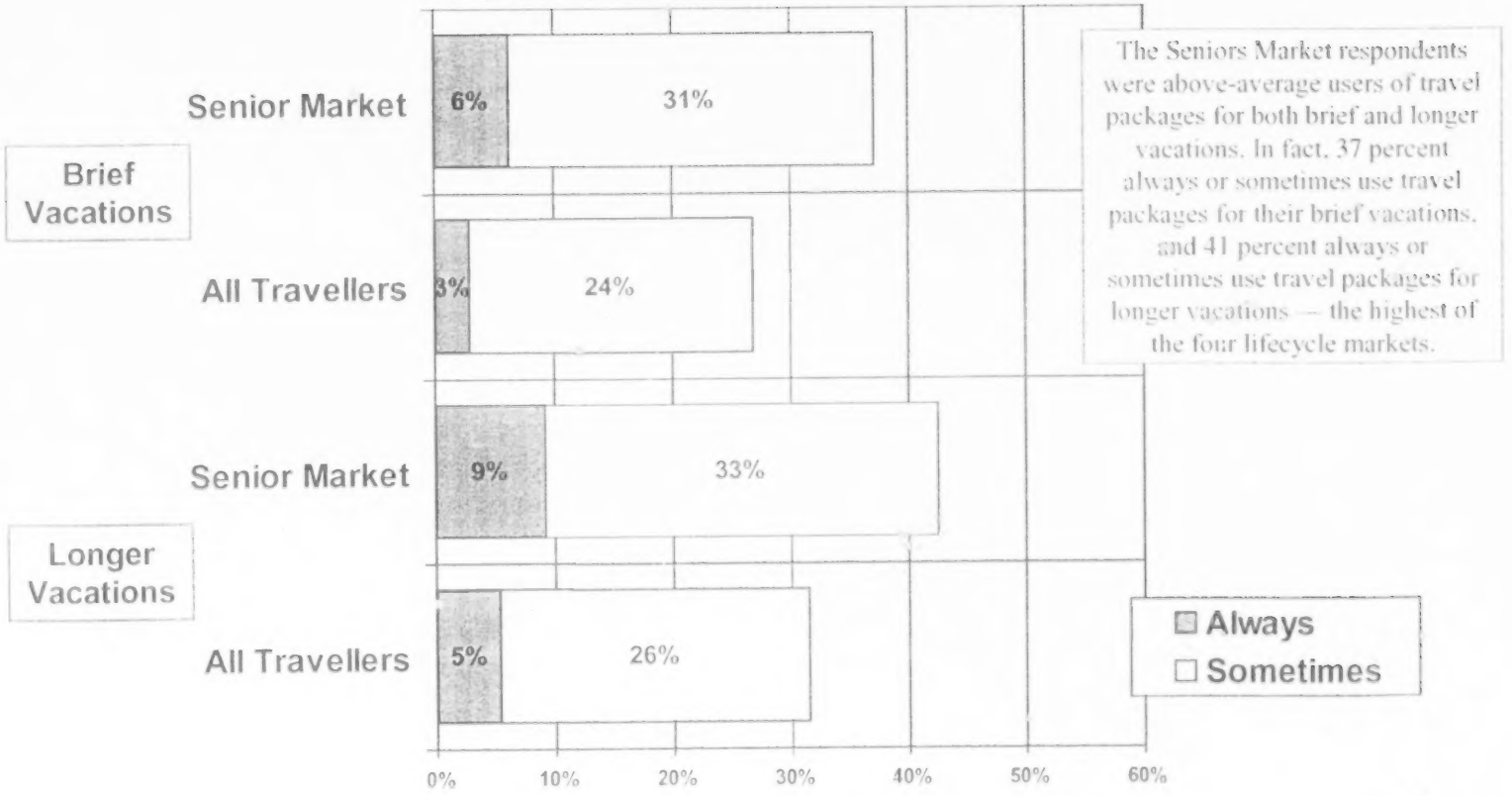
The Planning Information Used Index was computed by dividing the incidence with which each information source was consulted by each segment during the past two years by the incidence with which each source of information was consulted within the total market of travellers. A score of 1.0 means that rate at which a particular source of information was used was the same as the total market of travellers. Index values above 1.0 indicate that the segment was more likely to consult a particular information source while index values below 1.0 indicate that the segment was less likely to have consulted a particular information source to plan vacations than the total market of travellers. For example, an index value of 1.2 means that the Seniors Market was 20 percent more likely to have consulted a particular information source than the total market of travellers during the past two years.

How Often Travel Packages Used for Brief and Longer Vacations In Last Two Years

Base: Total Population (18-Plus) Who Took an Overnight Trip in Last Two Years: Canada and United States (Mailback Survey)



The Seniors Market respondents were above-average users of travel packages for both brief and longer vacations. In fact, 37 percent always or sometimes use travel packages for their brief vacations, and 41 percent always or sometimes use travel packages for longer vacations — the highest of the four lifecycle markets.


Senior Market
Brief Vacations
6%
31%
All Travellers
3%
24%
Senior Market
Longer Vacations
9%
33%
All Travellers
5%
26%
0%
10%
20%
30%
40%
50%
60%
Always
Sometimes
The Seniors Market respondents were above-average users of travel packages for both brief and longer vacations. In fact, 37 percent always or sometimes use travel packages for their brief vacations, and 41 percent always or sometimes use travel packages for longer vacations — the highest of the four lifecycle markets.

Seniors Market Media Index for Print Media: Canada and U.S.

Percent Reading Each Publication Type in Segment By Percent Reading Each Publication Type Among Travellers

Base: Total Population (18-Plus) Who Took an Overnight Trip in Last Two Years: Canada and United States (Mailback Survey)

Media indexing for various types of print media (see Technical Note below) suggests that the Seniors Market can best be reached through news magazines, such as Time or Maclean's. They also exhibited above-average consumption of general interest or city life magazines such as The New Yorker, specialty newspapers and sports magazines

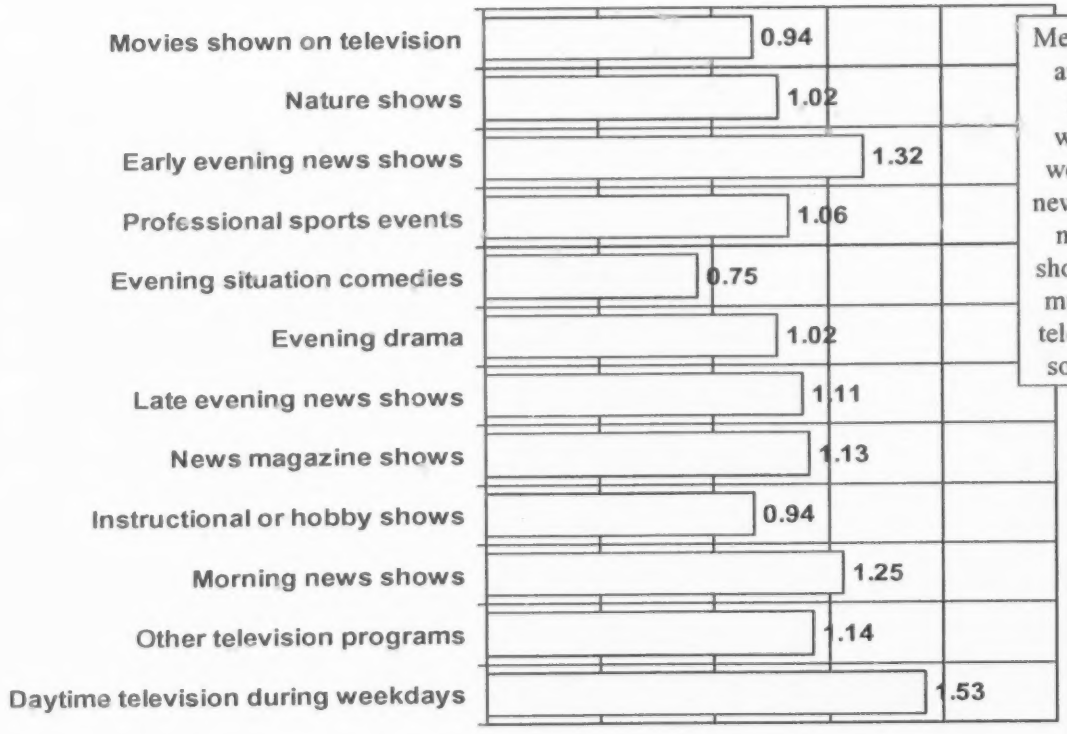
Technical Note

The Media Index was computed by dividing the percent within each segment that routinely read each publication by the percent in the total market that routinely read each publication. A score of 1.0 means that readership was the same as the total market. Index values above 1.0 indicate that the readership was above average while index values below 1.0 indicate that readership was below average. For example, an index value of 1.2 means that the Seniors Market was 20 percent more likely to read a particular publication than the total market of travellers.

Seniors Market Media Index for Television: Canada and U.S.

Percent Watching Each Type of Programme in Segment By Percent Watching Each Type of Programme Among Travellers

Base: Total Population (18-Plus) Who Took an Overnight Trip in Last Two Years: Canada and United States (Mailback Survey)



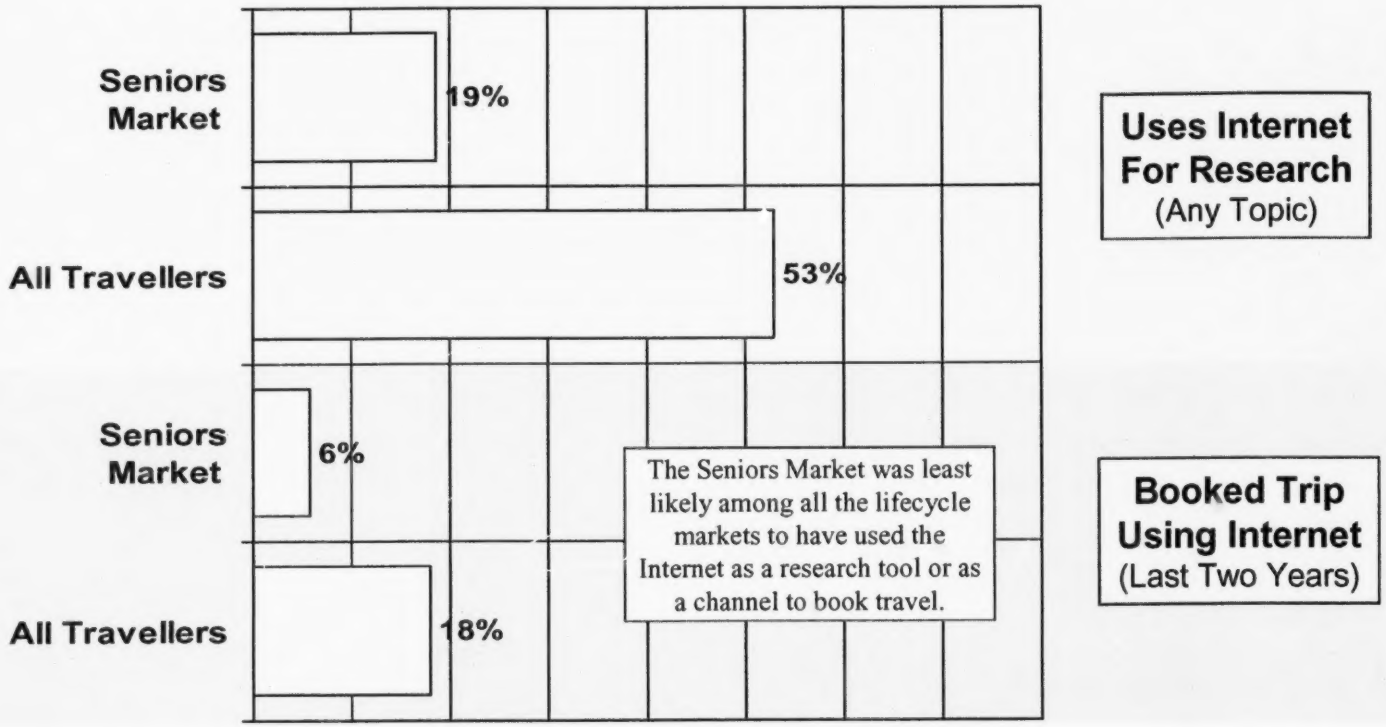
Members of the Seniors Market tended to be avid television viewers. This market was 53 percent more likely than average to watch weekday daytime television. They were also more likely to watch all types of news programming, especially early evening news shows and morning news shows. It should be noted, however, that Seniors were much less likely than average to have used television programmes or advertisements as sources of information to plan their travel.

Technical Note

The Media Index was computed by dividing the percent within each segment that routinely viewed each programme by the percent in the total market that routinely viewed each programme. A score of 1.0 means that viewership was the same as the total market. Index values above 1.0 indicate that the viewership was above average while index values below 1.0 indicate that viewership was below average. For example, an index value of 1.2 means that the Seniors Market was 20 percent more likely to watch a particular programme than the total market of travellers.

Percent Using Internet and Booking at Least One Trip Using the Internet

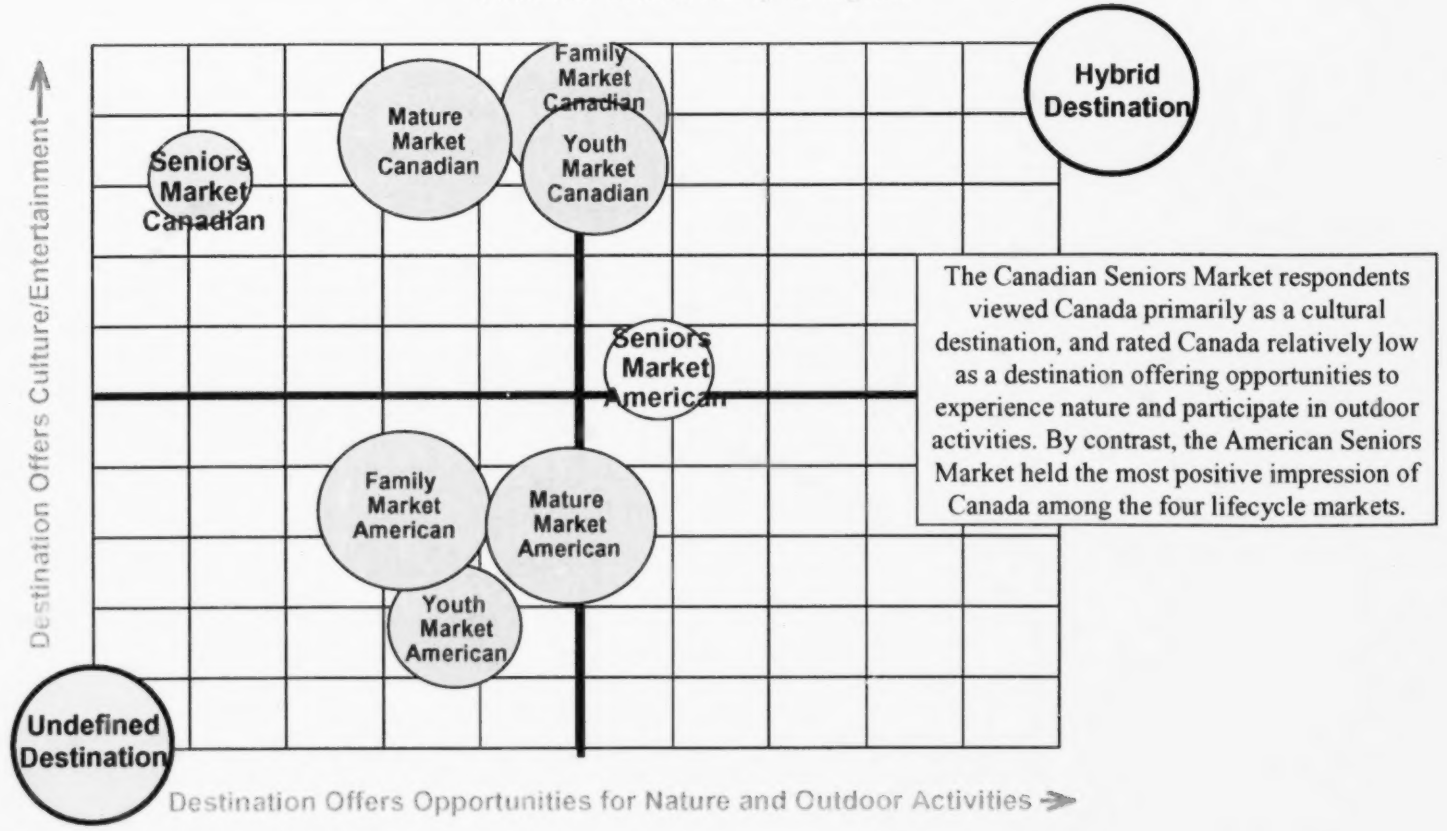
Base: Total Population (18-Plus) Who Took an Overnight Trip in Last Two Years: Canada and United States (Mailback Survey)



Seniors Market
Vacation Image of Canada

Base: Total Population (18-Plus) Who Took an Overnight Trip in Last Two Years and Were Able to Rate Canada On One-Plus Attributes: Canada and United States (Mailback Survey)

Circle Size Denotes Size of the Segment

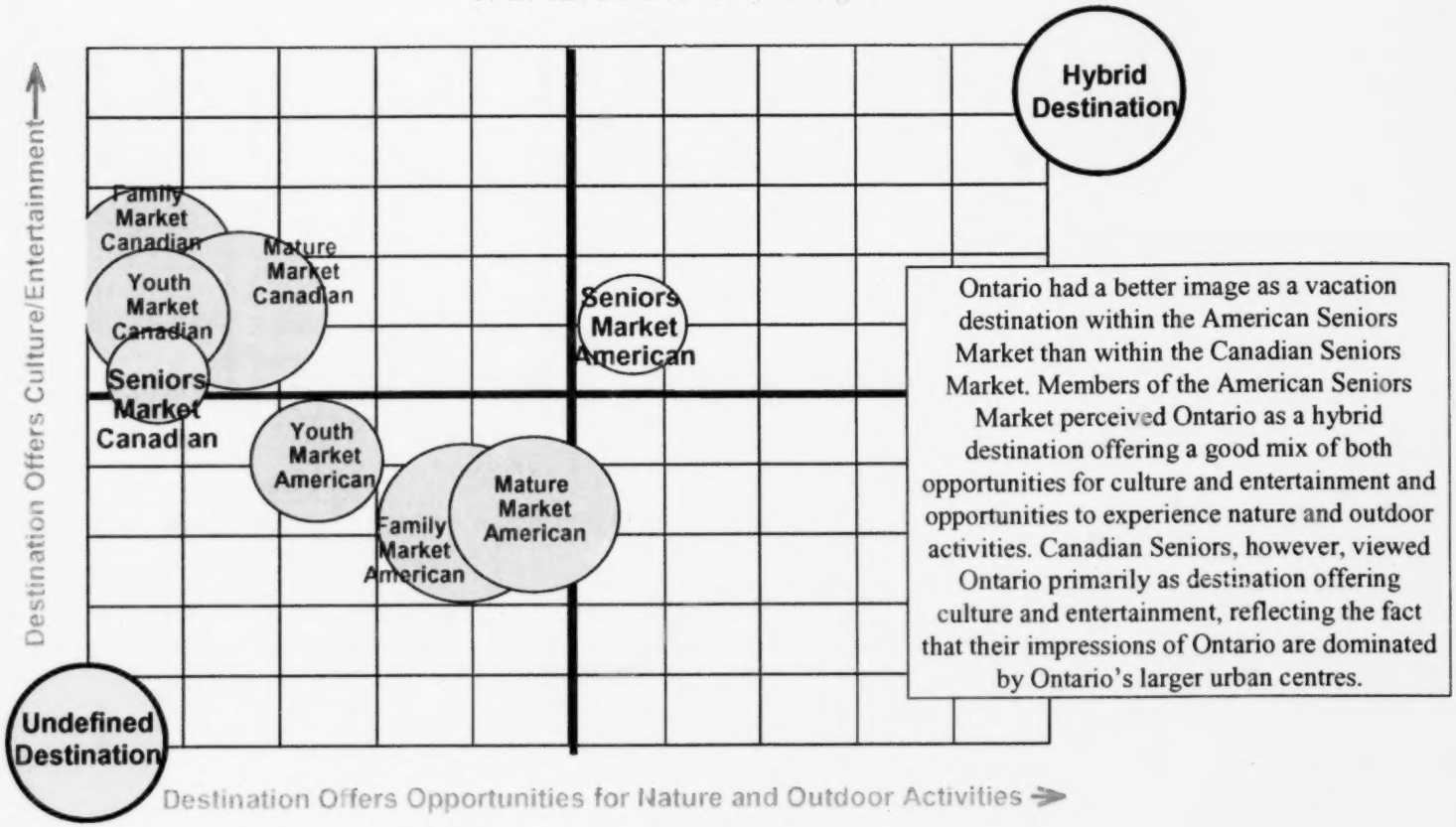


The Canadian Seniors Market respondents viewed Canada primarily as a cultural destination, and rated Canada relatively low as a destination offering opportunities to experience nature and participate in outdoor activities. By contrast, the American Seniors Market held the most positive impression of Canada among the four lifecycle markets.

Seniors Market
Vacation Image of Ontario

Base: Total Population (18-Plus) Who Took an Overnight Trip in Last Two Years and Were Able to Rate Canada On One-Plus Attributes: Canada and United States (Mailback Survey)

Circle Size Denotes Size of the Segment

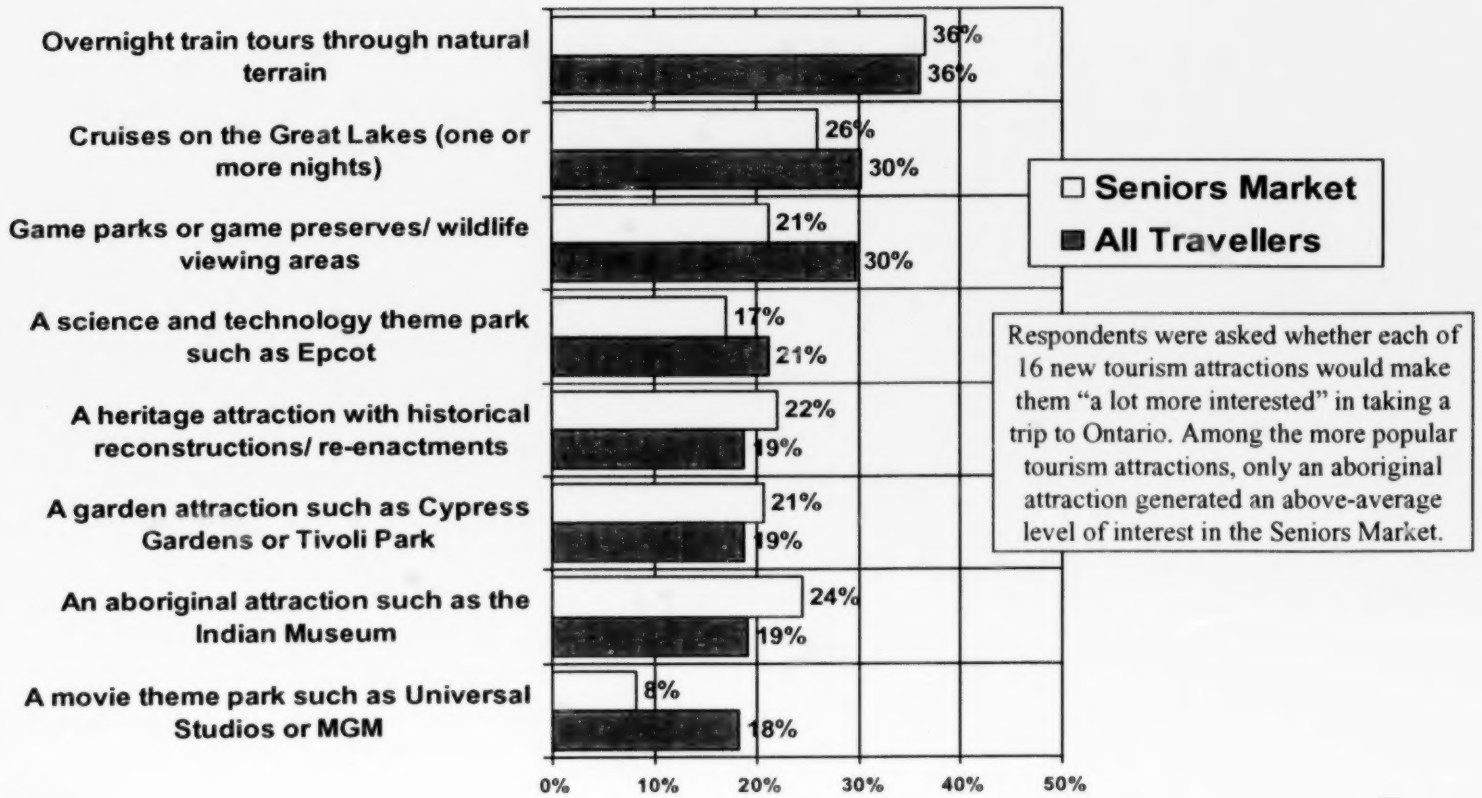


Ontario had a better image as a vacation destination within the American Seniors Market than within the Canadian Seniors Market. Members of the American Seniors Market perceived Ontario as a hybrid destination offering a good mix of both opportunities for culture and entertainment and opportunities to experience nature and outdoor activities. Canadian Seniors, however, viewed Ontario primarily as destination offering culture and entertainment, reflecting the fact that their impressions of Ontario are dominated by Ontario's larger urban centres.

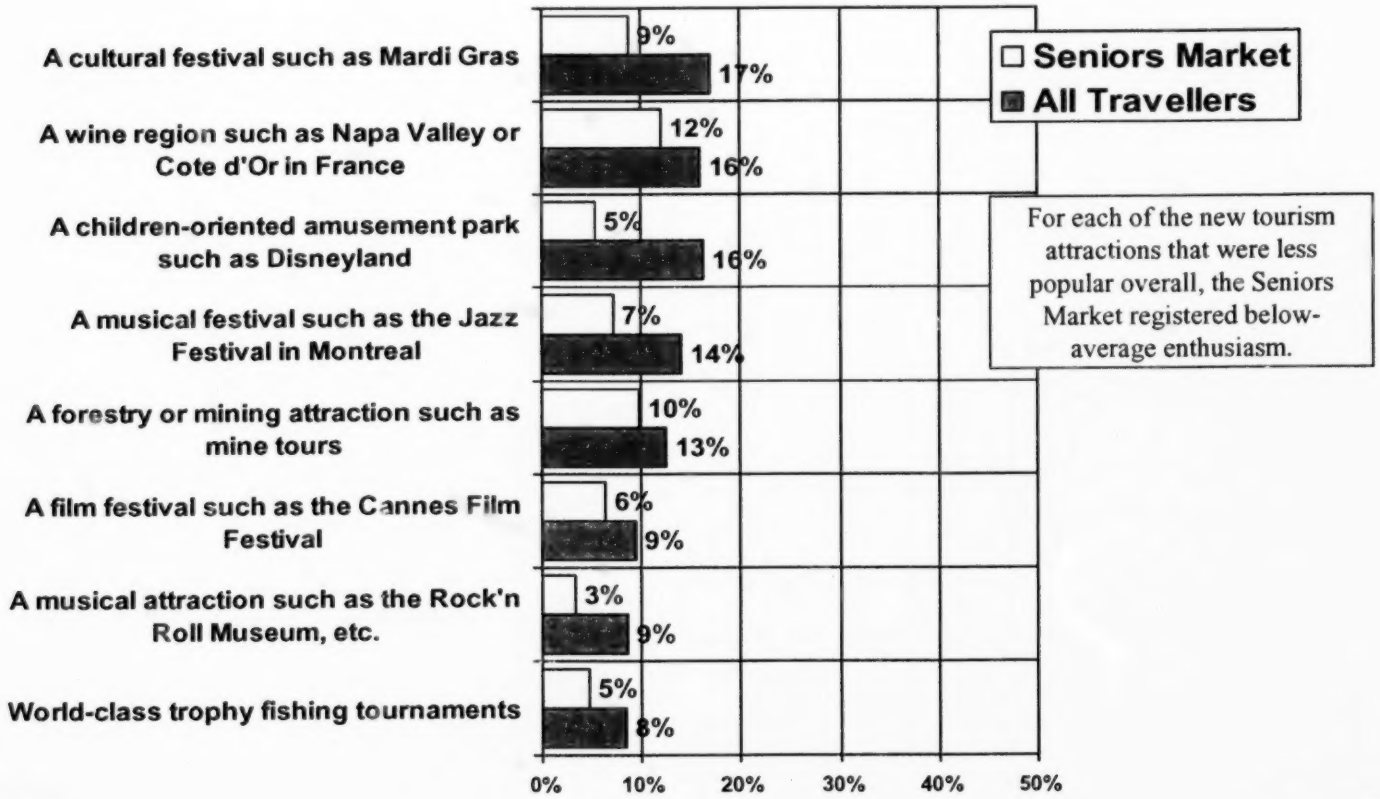
Seniors Market Interest in New Tourism Products (Part One of Two)

Percent Stating Attraction Would Make Them "A Lot More Interested" in Taking a Trip to Ontario

Base: Total Population (18-Plus) Who Took a Trip in Last Two Years: Canada and United States (Mailback Survey)



Seniors Market Interest in New Tourism Products (Part Two of Two)

Percent Stating Attraction Would Make Them "A Lot More Interested" in Taking a Trip to Ontario

Base: Total Population (18-Plus) Who Took a Trip in Last Two Years: Canada and United States (Mailback Survey)